

FRANCE COUNTRY COMMERCIAL GUIDE FY 2002

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This Country Commercial Guide (CCG) presents a comprehensive look at France's commercial environment from economic, political and market perspectives. The CCGs were established by recommendation of the Trade Promotion Coordinating Committee (TPCC), a multi-agency task force, to consolidate various reporting documents prepared for the U.S. business community. Country Commercial Guides are prepared annually at U.S. embassies through the combined efforts of U.S. government agencies represented there.

France is the world's fourth largest industrialized economy. Its recent impressive growth and continued expected expansion make this one of the foremost markets worldwide for American goods and services. With an annual GDP about one-fifth that of the United States (USD 1.36 trillion in 2001), France is our ninth largest trading partner, accounting for USD 27 billion of U.S. exports of goods and services in 2000. France is a member of the G-8, the European Union, the World Trade Organization and the OECD, confirming its status as a leading economic player in the world.

Ensuring that France's business climate is attractive to foreign investors is a priority for French government officials, who see foreign investment as an important way to create jobs and stimulate growth. In recent years, foreign investment has been growing at a rate considerably higher than that of the economy as a whole. The United States is the largest foreign investor in France, with the book value of U.S. firms representing 17 percent of the stock of direct foreign investment according to French statistics. The market value of the stock of U.S. investment in France may be as much as double the \$40 billion book value for 1999 reported in U.S. Department of Commerce data

The United States and France share many trade similarities, in particular their status as the world's top two exporting countries in three key sectors: defense products, agricultural goods, and services. In addition, France is currently "digitizing" its economy,

embracing the Internet with accelerating rapidity. The beneficial effects of this transformation in term of increased productivity; employment and growth are just beginning to be realized.

France's population of 60 million people has a high disposable income of USD 23,000 per capita. In 2000, French GDP grew by 3.3 percent in real terms, following 3.0 percent growth achieved in 1999. The outlook for 2001 and 2002 is for continued growth, albeit at a somewhat reduced rate, as the effect of the U.S. slowdown ripples through France and the other European economies. The French government projects growth close to 2.3 percent in 2001. Inflation remains low and under control

France's coalition government, led by the Socialist party, is concentrating on implementing a domestic agenda focused on maintaining high economic growth and lowering unemployment, which has been reduced to 8.6, as of May 2001. As a spur to create jobs, plans for a reduction of hours worked from 39 to 35 hours per week are being implemented. The new workweek officially came into effect on February 1, 2000, for medium-to-large firms. Its full economic impact remains uncertain. However, some large companies have indicated that the cost of the 35-hour workweek has been partially offset by increased flexibility in work schedules.

France has a tradition of highly centralized administrative oversight of its economy. Most experts agree that continued market-based structural and regulatory reform will be required in order to achieve the country's full potential for economic growth. In 2000 total general government outlays amounted to 52.8 percent of GDP. Efforts to sell French government-owned enterprises continue, but the public sector still controls major firms in several sectors (aeronautics, automobiles, telecommunication, energy). In addition, the same French concept of a "golden share" gives the government a virtual veto in strategic moves made by key firms in which it holds a minority interest. Although progress has been made in privatization and in a corresponding reduction of the budget deficit, taxes remain the highest in the G-7 industrial countries. In addition, regulations of goods and labor markets remain pervasive. It should be noted, for example, that the French government has been criticized by the E.U. Commission for not deregulating sufficiently its electric power industry

Further structural change is likely to be stimulated by global competitive pressures on France's economy and the continued evolution towards a European Single Market. Both President Jacques Chirac and Prime Minister Lionel Jospin are strong advocates of European Union as a way to strengthen France both politically and economically. France's adoption of the Euro, as its single currency, along with 10 other EU countries, has increased competitive pressures on the French economy. The actual Euro currency will be introduced throughout Europe beginning January 1, 2002, thus completing its implementation program, further strengthening Europe's regional integration.

In general, the commercial environment in France is favorable for sales of U.S. goods and services. Marketing products and services in France bears similarity to the approach in the U.S., notwithstanding some significant differences in cultural factors, and certain legal and regulatory restrictions. But, as reflected in the continued growth of direct marketing and franchising, American sales concepts are increasingly impacting upon French marketing practices and distribution channels. Moreover, France, perhaps more than any country in Western Europe, is poised for the Internet "revolution" which is expected to drive further economic growth and establish even stronger commercial

linkages with the U.S. economy. While use of the Internet is rapidly increasing, electronic commerce in France is still dominated by the huge, if declining, installed base of France Telecom's "Minitel" units.

The leading non-agricultural products considered to offer "best prospects" for U.S. business in France are (in order of market size): Computer Software, Aircraft & Parts, Industrial Chemicals, Computers and Peripherals, Electronic Components, Telecommunications Equipment, Scientific Laboratory Equipment, Medical Equipment, Pollution Control Equipment and Services, Automotive Parts and Service Equipment, Agricultural Machinery, Textile, Plastics, Pleasure Boats & Accessories and Biotechnology. On the services side, the French markets for Travel & Tourism, Employment Services, Telecommunication Services, Education Services and Franchising hold the most promising export potential for American suppliers. Travel and tourism is the single largest U.S. "export" earner, as the French increasingly travel to the U.S. for business and pleasure.

In 2000, French imports of U.S. food and agricultural products (including manufactured tobacco, spirits, and wood products) were valued at USD 722 million, a decrease of 12.4 percent compared to 1999. Processed fruits and vegetables (including fruit juices) are the leading U.S. agricultural exports, valued at USD 102 million. Fish and seafood, and fresh and dried fruits, were the second and third largest export items, reaching USD 98 million and USD 88 million, respectively. The French market for food products is mature, sophisticated and well-served by suppliers from around the world. Generally, high quality food products with an American image can find a niche in the French market, particularly if they can gain distribution through stores and supermarkets that specialize in U.S. or foreign foods. Niche market opportunities also exist for regional American foodstuffs (Cajun, California Cuisine and Tex-Mex), candies and chocolates, wild rice, and organic and health food products.

France offers a variety of financial incentives to American and other foreign investors. Its investment promotion agency, DATAR, provides extensive assistance to potential investors both directly in France and through its agencies around the world. Financial subsidies and tax incentives are also offered to attract investment by regional and city authorities, particularly to the country's economically depressed areas. Foreign companies registered in France essentially receive the same treatment as French-origin firms with respect to participation in technology development programs sponsored by the French and E.U. governments and have equal access to their R&D funding. There are restrictions in certain sectors, however (see Chapter 7: "Investment Climate"). Though some aspects of the investment climate could be improved, especially the tax structure (there are over 100 taxes), France still continues to offer a myriad of attractive investment opportunities.

In support of U.S. commercial interests in France, the U.S. Embassy in Paris uses the combined resources of various U.S. Government agencies to promote exports of U.S. goods and services. It also supplies information on attractive areas of trade and investment opportunity, and serves as an advocate for U.S. firms.

Country Commercial Guides can be ordered in hard copy or on diskette from the National Technical Information Service (NTIS) at 1-800-533-NTIS. U.S. exporters seeking general export information/assistance or country-specific commercial information should consult with their nearest Export Assistance Center or the U.S.

Department of Commerce's Trade Information Center at (800) USA-TRADE, or go to one of the following web sites:

www.usatrade.gov or www.tradeinfo.doc.gov

A. Major Trends and Outlook

In 2000, French GDP grew by 3.3 percent in real terms compared with 3.6 percent in 1998 and 3.0 percent in 1999. The 2000 performance marked the third consecutive year of growth at or over 3 percent, and a clear improvement since the slow growth of the mid-1990s. Inflation remained low and under control. Gross fixed investment, especially in the business sector, continued to provide the foundation for growth in 2000, expanding by 8.0 percent in 1999 and 7.9 percent in 2000. Strong growth helped bring the unemployment rate to 9.0 percent by the end of 2000. The unemployment rate continued to fall in 2001, down to 8.7 percent at the end of the first quarter (the last time unemployment fell below 10 percent was in December 1991). No more progress was made in April and May

The outlook for 2001 and 2002 is for continued growth, albeit at a reduced rate. As the effect of the U.S. slowdown on France and other European economies is getting clearer the government projects growth at 2.3 percent in 2001. Achieving 3 percent growth in the next few years would require very positive effects of investment in new technologies and continued efforts toward structural reforms.

Despite good short-term prospects, most observers believe the French economy continues to function below its long-term potential. Reaching that potential will require continued deregulation and reduction of the role of the state in the economy. Progress was made during the 1990s, notably in privatization and reduction of budget deficits, but taxes remain the highest in the G-7 industrial countries and regulation of goods and labor markets is pervasive. Although some piecemeal reforms have been implemented to address structural rigidities in the labor market, experts question whether unemployment will drop below the presumed structural rate of unemployment, estimated at 8.5 percent, absent further significant liberalization. Furthermore, the full economic impact of the transition to the 35-hour workweek, as of January 1, 2000, is not yet clear. Based on preliminary official estimates the 35-hour workweek has created 150,000 jobs in 2000 or 30 percent of new jobs. Many large companies have said that the cost of the 35-hour workweek has been partially offset by increased flexibility. France's adoption, along with 10 other EU countries, of the Euro as their single currency has increased competitive pressures on French companies and the French economy.

B. Principal Growth Sectors

In 2000 the five fastest growing sectors, as measured in real terms in the new 1995 accounting basis, were consulting services (10.2 percent), meat and milk products (10.2 percent), public works (9.2 percent), insurance and financial services (8.2 percent) and recreation, culture and sports (7.4 percent). As measured in nominal terms these sectors represented 7.3, 1.0, 1.0, 1.3, and 1.8 percent of total value added, respectively (2000 numbers).

C. Government Role in the Economy

France has a tradition of highly centralized administrative oversight of its essentially market-based economy. In 2000, total general government outlays amounted to 52.8 percent of GDP. This is one of the highest ratios among OECD countries. Considerable progress has been made in privatization, although the government maintains a presence in industries such as aeronautics, defense, automobiles, and telecommunications, and can still exert control over privatized firms (see attached discussion of “golden share” provisions in section VII).

D. Balance of Payments

While France has run overall trade and current account surpluses in recent years, even a surge in export earnings in the fourth quarter 2001 could not stop the trade balance from showing its first visible deficit since 1991. The fourth quarter surge in exports did not offset a decline in exports in the second and the third quarter due to a fall in global trade. The trade and current account balances totaled USD 1.8 billion and USD 24.6 billion, respectively, in 2000. According to French government data, France runs a deficit in its trade with the United States. (U.S. data tell a somewhat different story, which is usually explained by the significant amounts of U.S. products that are re-exported to France from Dutch and Belgian ports.)

E. Trade Barriers

As a member of the European Union, France shares common tariff and, in many cases, non-tariff external barriers with other members of the Union. Product safety and sanitary standards affecting imports into France are increasingly established at the EU level. The United States and EU have negotiated Mutual Recognition Agreements covering certain product standards that should ease entry into EU and French markets for U.S. firms. Despite occasional highly publicized disagreements, the sizable bilateral trade between the U.S. and France is for the most part non-controversial.

G. Labor Force

France's private sector labor force is one of the country's strongest points in attracting foreign investment, combining high quality with competitive unit wage costs.

The labor code sets minimum standards for working conditions including the workweek, overtime, vacation and personal leave. Other labor standards are contained in collective agreements, which are usually negotiated by sector on a national or regional basis by the various unions and employers' associations. French absenteeism is modest by European standards and in the private sector peaceful labor relations prevail.

While the rate of unionization in France has steadily declined to about half that of the United States, French labor law provides an extensive institutional role for employee representatives and for organized labor.

- In companies with more than 10 employees, employee delegates are elected for a one-year term. They are authorized to present individual or collective claims and grievances relating to working conditions, to inform government labor inspectors of any complaints under the labor law, and to concur with management in any reorganization of

the workweek. Management is required to meet with employee delegates at least monthly.

- A company with more than 50 employees must have a joint management/employee enterprise committee, to which employee representatives are elected. The committee must be consulted for all major corporate decisions, but has no veto. The enterprise committee must be provided with the same information that is made available to shareholders. It is funded by the company at a rate equal to at least 0.2 percent of the firm's payroll, and uses this money to finance social and cultural activities for the benefit of employees.
- Workers also hold most slots on occupational health and safety committees, which are mandatory in medium and large size companies. Labor tribunals (playing a role largely equivalent to the NLRB in resolving labor disputes) are comprised of equal numbers of union and employer representatives. Appeals are possible to the level of the Cour de Cassation, one of France's high courts.

H. Major and Third Country Competitors

As the world's fourth largest economy, centrally located within the European Union, there is strong competition for market share in all French industrial and service sectors. American exporters to France generally face more competition from European companies than from Asian ones, although Japanese companies have successfully established a foothold in the French market, primarily through investment. German companies tend to be strong competitors, building on the many Franco-German joint ventures. Each sector has its own characteristics and should be carefully analyzed as part of a strategy to capture a share of the French market.

I. Infrastructure Situation

France's transportation infrastructure is among the most sophisticated in the world, benefiting from advanced technology and extraordinary investment by the government. The three main entry points for air freight are the Orly and Charles de Gaulle airports in Paris and Lyon's Saint-Exupery airport. France has twelve major seaports, many of which are equipped for container ships. There is also an extensive highway and river-transport system and a state-owned rail network that is among the most comprehensive and technologically advanced in the world.

Communications infrastructure is similarly advanced. Telephone lines blanket the country and there is easy access to the Internet via French and foreign service providers. The French "Minitel" telephone-based computer network is also widespread and provides many consumer services. France is behind the U.S. and some other countries in the use of personal computers and the Internet, but is catching up rapidly. High-speed Internet access is still limited, but should expand rapidly in 2002. The government is trying to promote better use of information technologies.

A. Bilateral Relationship

France and the U.S. are long-standing, close allies. Despite occasional differences of view, the U.S. and France work together on a broad range of trade, security and

geopolitical issues. In general, the U.S. and France agree on strategy, even if they may differ on tactics.

B. Political System

France is a democratic republic whose political system is based on a written constitution that was approved by referendum in 1958. According to the French Constitution, the President of the Republic is elected by direct suffrage every five years. The President presides over the cabinet, commands the armed forces, and concludes treaties. He is also empowered to dissolve the National Assembly and, in certain emergency situations, may assume full power. The President appoints the Prime Minister, but because France's political system is a hybrid of presidential and parliamentary elements, the composition of the National Assembly (the lower house of the French parliament) traditionally determines the party or political grouping from which the President must choose his Prime Minister. This has occasionally resulted in the head of state and the head of government being from opposing parties, in an arrangement known as "cohabitation". Currently, center-right President Jacques Chirac "cohabits" with a government of the center-left that was elected in June 1997. The Socialist-led coalition includes representatives of the Communist and Green parties and is headed by Prime Minister Lionel Jospin, who ran unsuccessfully against Jacques Chirac in the 1995 presidential elections.

The Constitution provides for a bicameral parliament consisting of a National Assembly and a Senate. National Assembly deputies are directly elected by universal suffrage for five-year terms. Senators are indirectly elected for nine-year terms; one-third of the Senate is renewed every three years.

The French political spectrum includes numerous political groups. Key among these, from the right to the left, are: the extreme right National Front (FN); the neo-Gaullist Rally for the Republic (RPR), from which a rival group, the Rally for France (RPF), broke away in 1999; the moderate Union for French Democracy (UDF); the Socialist Party (PS); the Green party; and the Communists (PCF). Other smaller parties have minimal national political impact, but exert influence on a local and even occasionally on a national level.

C. Political Events Affecting Business Climate

The current cohabitation between center-right President Chirac and Socialist Prime Minister Jospin has largely proceeded smoothly and enjoys strong backing from the French public. With the approach of presidential and National Assembly elections in early 2002, however, signs of tension between Chirac and Jospin are increasingly evident. One notable example was a successful Socialist initiative to reverse the order of the 2002 elections so that the presidential election would precede those for the National Assembly, a move Chirac opposed and which was interpreted as favorable to Jospin. Municipal elections in March 2001 gave the Left control of the major cities of Paris and Lyon even as it suffered serious setbacks elsewhere. After a record four years in office, Jospin has had to contend with perceptions his government has run out of momentum and new ideas. The Communists' poor showing in the municipal elections has further provoked a new series of crises within that party, still searching for its post-

Cold War identity, and within the "plural Left" coalition. Greens, who did relatively well last March, are pressing for greater weight in the coalition. Signs of economic slowdown and a series of highly publicized layoffs have given the Communist and Green parties a pretext to renew pressure on the Socialists to pursue more traditional leftist policies. Disarray among center-right parties, the lack of a clearly defined alternative to the center-left policies of the current government, and unanswered questions about Chirac's role in scandals dating back several years limit the opposition's and Chirac's attitude.

Despite problems with their coalition partners, the Socialists continue to concentrate on implementing a domestic agenda focused on economic growth and bringing down high unemployment. Fiscal policy has emphasized meeting budgetary disciplines set forth under the Maastricht Treaty. The government has made some initial progress in lightening the tax burden on employers to stimulate job creation but has hesitated to take more fundamental structural reforms. Efforts to implement a reduction of work time from 39 to 35 hours a week as a spur to create jobs are ongoing. On February 1, 2000, the law establishing the shorter workweek went into effect for firms of 20 or more workers; smaller firms have until January 1, 2002, to comply. The Jospin government has put off reform of the pension system, mindful of the bitter experience of its center-right predecessor when it attempted to tackle this highly emotional issue.

Both Chirac and Jospin are strong advocates of the European Union. They view a strong Europe as a way to strengthen France, both economically and politically. The French are also fully supportive of the Economic Monetary Union (EMU), and France is one of the eleven initial members of the EMU. French efforts to elaborate a detailed European plan to stimulate job creation, however, have so far been unsuccessful.

Chirac's decision in 1996 to streamline defense industries and to restructure the armed forces has led to mergers and industrial realignments among French defense firms in 1998 and 1999. The Jospin government has helped to move ahead in privatizing and merging defense industries, such as Thomson-CSF and Aerospatiale-Matra.

The United States and France produce many of the same goods and services and export them to each other. Therefore, marketing products and services in France can bear some resemblance to marketing them in the United States. French business representatives are sophisticated and knowledgeable about their respective markets. At the same time, American firms must take into consideration certain business practices, cultural factors, and legal requirements in order to do business effectively in France. A basic assumption should be that everything will not always be as it is in the U.S. Following is a general overview of marketing in France. Specific counseling sessions with United States Department of Agriculture/Foreign Agriculture Service & Department of Commerce/U.S. Commercial Service trade specialists are recommended for those wishing more details as they plan their specific marketing campaigns in France.

- Distribution & Sales Channels:

The Retail Network:

France possesses a diverse and comprehensive retail network, which increasingly resembles that of the United States. From the largest department store chains to the

smallest individual proprietorships, French distribution channels are demonstrating some significant new trends, which could affect how products are sold in France.

Small- and medium-sized family-owned firms, which traditionally accounted for a majority of French wholesale and retail trade, are rapidly losing ground to hyper markets - large retail outlets carrying a wide variety of products at discounted prices. At the same time, mail order marketing and specialized chain stores have shown strong growth, further demonstrating the changing needs and preferences of consumers. On the other hand, a law limits the amount of retail space that can be purchased or leased commercially, with a special exemption required for space purchased or leased that is greater than 300 square meters.

Primary Retail Channels:

- Grands magasins - Department Stores
- Hypermarchés - Hypermarkets
- Supermarchés - Supermarkets
- Magasins populaires - Convenience Stores
- Magasins discount - Hard Discounters
- Grandes surfaces specialisees - Large Specialized Stores
- Groupes de distribution multi-canaux - Multi-Channel Retail Groups
- Vente par catalogue - Mail-order Marketing
- Centrales d'achats - Central Buying Offices

Department Stores:

Currently 28,525 people are employed by the 107 department stores in France. However, the British chain Marks & Spencer announced in March 2001 that it would be closing all of its stores in France, this closure will reduce the current number of department stores by 8 by the end of year 2001. Sales have been increasing an average of 3.4 percent per year over the last three years and reached approximately USD 3,487 billion (FF 24,410 billion) in 1999. Paris has the highest number of department stores of any French city, and six of the ten top-selling stores are located there. Department stores have lost some market share in all areas except in the medium-to-high price range. A unique feature of the French department store is that many non-food products are sold by the manufacturer's own sales staff, which can account for up to 20 percent of the store's total sales force.

Hypermarkets:

Hypermarkets are technically defined as stores with a minimum selling area of 2,500 square meters. On average, French hypermarkets are self-service retail stores offering 25,000-40,000 products for sale at competitive prices, of which 3000-5000 are food items and 20,000-35,000 are a non-food article. They are generally located in suburbs, and cover a total sales area of 6.5 million square meters. Although, for the second year in a row, there were no new openings of hypermarkets in 2000, the sector continues to grow through expansions of existing stores. As of September 1, 2000, there were 1,154 hypermarkets, employing over 220,000 people. The top five hypermarket companies are Leclerc, Carrefour, Auchan, Geant and Continent.

Supermarkets:

Supermarkets are also self-service retail grocery stores. In essence, supermarkets are smaller versions of hypermarkets, with a selling area between 300 and 2,500 square meters. They usually carry 3,000-5,000 items, of which 500-1500 are non-food products, and cover a total sales area of 6.6 million square meters. As of September 1, 2000, there were 5,863 supermarkets, employing over 150,000 people. The top five supermarket companies are Intermarché, Super U, Champion, Stoc and Shopi.

City-Center Stores:

Defined as high-quality supermarkets, and dating back to the turn of the century, these establishments are smaller than regular supermarkets, are usually located in town centers and offer a wide selection of food and non-food products. These stores number over 300 in total and tend to be grouped under major leading companies such as Monoprix/Prisunic. City-Center Stores seem to be in a state of decline as their numbers have dropped 25% in the last 5 years.

Hard Discounters (Discount Grocers):

Hard Discount Stores trade principally on the basis of low price. They do not offer a comprehensive range of goods and are, thus, not as convenient as supermarkets and hypermarkets. As of September 1, 2000, there were a total of 2,362 hard discount stores in France. These stores represent about 8 percent of total food sales and usually sell generic products or their own private-label items. They generated total sales of USD 11.29 billion in 1998. The top five hard-discount companies are Lidl, Ed, Aldi, Leader Price and Le Mutant.

Large Specialized Stores:

Large specialized stores offer an extensive choice of goods in a specific category at a competitive price and with an emphasis on customer service. This dynamic sector was composed of over 8,200 stores in 2000, including such store categories as toys, health and beauty, gardening, and media/books/music. Do-it-yourself equipment stores are the most numerous (2,356), followed by textile (1,569) and furniture stores (1,227).

Multi-Channel Retail Groups:

The distinctions made above between hypermarket chains, supermarket chains, etc. are becoming blurred. In the last several years, major multi-channel retail groups have emerged, which own chains of different types of stores. Pinault-Printemps and Nouvelles Galeries Reunies fall into this category, because they own chains of specialty and convenience stores.

Mail Order Marketing:

The French mail order market for consumer products is the third largest in the world. This market has tripled in the last ten years, reaching USD 7.43 billion (FF 52 billion) in 2000. Although total mail-order sales are still greater than telephone sales, a general downward trend in mail-order sales may be observed in recent years just as telephone sales have undergone a rapid expansion. One out of two French households buys through mail order with an average annual purchase of USD 310. Textile products

make up 46.5 percent of direct sales, books and records 11.6 percent, and furniture and home decoration 9.3 percent.

Central Buying Offices:

In addition to contacting the largest store chains listed above, introducing products via central buying agencies is an excellent distribution method. A complete list of French central buying agencies, the *Annuaire des Supermarchés, Hypermarchés, Centrales d'Achat et Groupements d'Achats*, is available for about US 308 (freight included) from:

L.S.A
Mrs. Majeau
12/14, rue Mederic
75809 Paris Cedex 17
France
Tel: (33) 1.56.79.43.00
Fax: (33) 1.56.79.43.06
Web Site: <http://www.lsa.fr>

Food Distribution & Sales Channels:

The Retail Network

Diverse and comprehensive, France's retail network is beginning to resemble that of the United States. French food retailers fall under six principal formats: Department stores, hypermarkets, supermarkets, city center stores, hard discounters, traditional outlets. The first five accounting for 75 percent of the country's food distribution; the sixth and seven, which includes neighborhood and specialized food stores for about 25 percent.

Developments in the last several years have altered the country's retail food distribution system. First, the Government of France passed legislation that limits the number of store openings among hyper/supermarkets. While the new law has limited the number of new establishments, it has prompted hyper/supermarkets to expand their existing surface areas. Second, mergers and alliances among major hyper/supermarkets have formed the country's 7 largest retailers with five central buying offices.

In 1999, Carrefour and Promodes merged, creating the world's second largest retail chain after Wal-Mart, Inc. The company had over \$52 billion in sales and 8,800 stores. In May 2000, Casino bought 50 percent of the shares of Monoprix. Consolidation in the sector is continuing rapidly.

With an eye to capturing market share from the restaurant and fast-food sectors, hyper/supermarkets have begun to sell ready-to-eat products.

Recently, creation of distribution website networks such as Global NexXchange has resulted in cross-border alliances, such as Sears and Carrefour.

Department Stores/City Center Stores:

City center stores are smaller than regular supermarkets and are usually located in town centers that offer a wide selection of food and non-food products. Some department stores in Paris have gourmet food sections. Although they do not account significantly

for total food sales in France they set the quality standard for product presentations. City center and department stores represent a total of about 21,800 outlets.

Hypermarkets:

Hypermarkets are technically defined as stores with a minimum selling area of 2,500 square meters. On average, French hypermarkets are self-service retail stores offering 25,000-40,000 products for sale at competitive prices, of which 3000-5000 are food items and 20,000-35,000 are a non-food article. They are generally located in suburbs, and in 2000 there were 933 hypermarkets in France. The top five hypermarkets based on the number of stores are: Leclerc, Carrefour, Auchan, Geant and Continent.

Supermarkets:

Supermarkets are also self-service retail grocery stores. In essence, supermarkets are smaller versions of hypermarkets, with a selling area between 300 and 2,500 square meters. They usually carry 3,000-5,000 items, of which 500-1500 are non-food products. In 2000, there were 4,537 supermarkets. The top five supermarkets based on the number of stores are: Intermarché, Champion, Super U, Stoc and Casino.

Hard Discounters (Discount Grocers):

Hard Discount Stores trade principally on the basis of low price. They do not offer a comprehensive range of goods and are, thus, not as convenient as supermarkets and hypermarkets. In 2000, there were a total of 2,352 hard discount stores in France. These stores represent about 8 percent of total food sales and usually sell generic products or their own private-label items. The top five hard-discounts based on the number of stores are: Lidl, Ed, Aldi, Leader Price and Le Mutant.

Traditional Outlets:

Traditional outlets include a broad array of establishments from corner grocery stores, bakeshops, and neighborhood butcher shops, to open air markets, to frozen and gourmet food stores. The aggressive expansion of mass distribution outlets threatens traditional outlets, which account for 20 percent of the country's total retail food distribution and represent a total of about 50,000 stores. To survive, these outlets must have flexible store hours, product variety, and special services such as home delivery. A small neighborhood store chain offers U.S. suppliers entry into the French market.

Convenience Stores, Gas-Marts and Kiosks: Convenience stores are generally located in city centers of small-to medium-size towns. They are self service stores run by one or two independent operations, i.e., individuals not paid by the distribution group. These stores have a total of 1,500 outlets representing no more than 3 percent of total food sales.

Gas-Marts linked with gasoline stations account for less than one percent of total food sales and represent about 400 outlets in France.

Wholesale Distribution of Food Products:

The food industry, however, continues to consolidate and diversify, with individual firms adding new services to their basic wholesale activities. Wholesalers now offer a whole "menu" of services for small and medium-sized food retailers and processors. Other services which wholesalers are adding to their repertoire include deliveries to

restaurants and other food institutions, as well as distributing new-to-market products for a fee. In spite of their efforts to consolidate, many traditional French wholesale food companies continue to lose ground to large super, and hypermarket chains, as well as to "hard discounters," which are increasingly expanding their own wholesale activities. Also, most of the major supermarket companies produce their own private labels for distribution, which effectively reduces the business for traditional wholesalers.

There are, throughout France, 17 wholesale markets generating total sales in 1998 of about \$11 billion. The largest wholesale market is Rungis, just outside of Paris, which groups together the traditional trade between suppliers, and clients, and complementary services, i.e., meat and cheese cutting, ripening, storage, packaging, health controls, logistics, etc. Rungis international market covers five product sectors: fruit and vegetables, meat products and preparation, seafood products, dairy and catering products (delicatessen, wines, etc.) and horticultural products. Next to the product sectors, the business center groups together the service companies to meet all business needs. The wholesale international market at Rungis is the most important fresh product market in the world. Rungis' sales total some \$7 billion annually. Its coverage area supplies around 18 million consumers.

For wholesalers of manufactured goods, the growth of hypermarkets and supermarkets, as well as hard discounters, offer a myriad of opportunities (see the list attached).

Hotel, Restaurants Food Institutions (HRI):

The French HRI food service is a USD 50 billion market that serves more than 7 billion meals per year outside the home. It is very competitive but offers opportunities for a variety of reasonably priced high quality U.S. products such as prepared meals, single portion packaged foods, alcoholic beverages, ethnic foods and fish. Experts predict that this market will grow at a rate of 4.5 percent per year in the next few years as new lifestyles take hold in France. U.S.-style outlets, especially fast food restaurants, are doing well in France.

France has one of the most highly developed distribution systems for agricultural and food products in the world. There is an extensive network of transportation and distribution channels that ensure consumers will receive the final product in good quality and at the proper time.

Normally, French imports of agricultural and food products are brought in from the west Atlantic via the northern French port of Le Havre, or via the ports of Antwerp, Belgium and Rotterdam, The Netherlands. Imports from the Mediterranean and African countries enter through the southern port of Marseille. Imports from other EU and European countries are often brought in by truck through the world's largest wholesale food market at Rungis, located south of Paris. Since much of the processed food products in France are of domestic origin, there are well-developed regional markets throughout the country.

Despite the fact that France has a very modern and relatively efficient distribution and transport system, frequent disruptions occur in product transport, due to unexpected strikes by port dockers or truck drivers, or some other labor dispute. Fortunately, the availability of alternative entry ports minimizes the magnitude of this problem for U.S. exporters.

- Use of Agents and Distributors; Finding a Partner:

Considering the host of distribution options available in France, it is important for the would-be exporter to select the method best suited to his or her product. French buyers generally prefer to purchase through an intermediary, making sales directly to the end-user a scarce practice. However, sales of expensive, technically sophisticated goods are an exception to this rule.

Intermediaries may take one of three primary forms under French law:

- Distributor
- Agent
- Salaried Representative

Distributor:

A distributor (concessionnaire) is an individual or legal entity who purchases goods directly from a producer for the purpose of resale. The distributor operates independently and is only bound by the written provisions of the distribution agreement. These agreements, however, are subject to specific rules and regulations regarding exclusive distribution and price-fixing.

The conditions of contract termination are an important concern, and vary with the type of distribution agreement. A distribution agreement of specified duration may be terminated at the end of the contract period by either party without prior notification or indemnification. If the termination takes place before the end of the contract period, the terminating party may be sued for breach of contract.

A distribution agreement with an unspecified duration may be terminated by either party without indemnification after a fair notice period, usually six months. The termination of such a contract by the producer without fair notice may be grounds for damage claims by the distributor.

Agent:

This category covers commercial agents as well as those persons acting as agents but not fulfilling the requisites for commercial agent status. Unlike distributors, agents do not actually purchase goods for resale; instead, they match up buyers and sellers on a commission basis. All agents exercise their activities in an independent manner, and their principals are exempt from payment of payroll taxes. Agents assume their own fiscal charges (business license tax and value-added tax) and social charges (health insurance, social security and retirement/pension benefits).

Commercial Agent::

Agents with a written contract have the status of commercial agents (agents commerciaux) if they exercise their activity as a sustained independent profession and fulfill the following conditions:

- Do not have a written employment contract;
- Negotiate sales and purchases on behalf of producers, manufacturers, or dealers;

- Are registered with the Tribunal of Commerce as commercial agents.

A commercial agent is independent and free to act on the behalf of any other firm. However, in the case where the agent wishes to represent one of his or her principal's competitors, consent of the principal must first be secured.

The principal may justifiably terminate the commercial agent contract only if the agent shows substantial deficiency in carrying out his or her obligations. Otherwise, contract termination gives the agent a right to indemnification, often equal to two years' commission.

Other agents: Persons who do not fulfill all the requirements for commercial agency, and who are not in a position of subordination to the company they represent, are considered agents. Authorization of an agent can be effected by notarial act or private agreement. Either party may terminate the agency agreement at will, but the non-terminating party has a right to indemnification of losses.

Salaried Representatives:

Unlike agents, salaried representatives have employment contracts. They and their employers share the burden of payroll taxes contributing to social security, unemployment compensation, and retirement/pension plans.

Statutory Representatives:

Whatever their qualifications or title, persons are considered statutory representatives if they exercise their activity as a sustained independent profession and fulfill the following conditions:

- Engage in the activity of a sales representative for the account of one or more employers;
- Desist from executing commercial operations on their own behalf;
- Institute mutual commitments with employers regarding the nature of: the goods or services offered for sale, the region of activity or the category of clients, and the rate of compensation.

Statutory representatives, like all employees, perform their work according to the instructions of their employers and benefit from the system of labor law protection. However, they possess a special right to indemnification if their employment is unjustly terminated. This indemnity is based on the size and importance of the clientele created by the statutory representative.

Non-statutory Salaried Representatives:

Representatives who are subordinate to their employers and who do not fulfill the requisites for statutory representative status fall into a separate category and are considered regular employees.

Finding a Partner

The Department of Commerce's International Trade Administration offers several services to help the would-be exporter identify potential foreign representatives. The three primary services available from the Commercial Service in France are the Gold Key Service, the Agent Distributor Service (ADS) and Industry Targeted Mailings. To request any one of these services, firms should contact the nearest U.S. Department of Commerce District Office. The number can be found in the US government pages of your telephone directory, or you may call 1-800-USA-TRADE.

Contacting and Evaluating Potential Representatives

Once the U.S. company has identified several potential representatives, it should contact them directly in writing. Just as the U.S. firm is seeking information on the French representative, the representative is interested in corporate and product information on the U.S. firm. The U.S. firm should provide full information on its history, resources, personnel, the product line, previous export activity, and all other pertinent matters.

At the same time the firm is providing information on itself, it should also engage in a thorough investigation of potential representative. Following is a list of important facts the firm should endeavor to find out:

- Current status and history, including background on principal officers
- Personnel and other resources
- Sales territory covered
- Current sales volume
- Typical customer profiles
- Methods of introducing new products into the sales territory
- Names and nature of U.S. firms currently represented
- Trade and bank references
- Assessment of whether U.S. firm's special requirements can be met
- View of in-country market potential for the U.S. firms products

The U.S. firm should not hesitate to ask potential representatives or distributors detailed questions; exporters have the right to explore the qualifications of those who propose to represent them overseas.

In addition, the U.S. firm is advised to obtain at least two supporting business and credit reports to ensure that the distributor or representative is reputable.

The French agency of Dun & Bradstreet offers this service.

Dun & Bradstreet France
Global Account Service
Service Renseignements de Notoriété
Immeuble Defense Bergeres
345, avenue Georges Clemenceau
92882 Nanterre cedex 09
France
Tel: (33) 1.41.35.18.98
Fax: (33) 1.41.35.17.00
Web Site: <http://www.dnb.com>

Negotiating an Agreement with a French Representative

Once the U.S. firm has selected a prospective representative, the next step is to negotiate a foreign sales agreement. The content of this agreement is extremely important, as it will determine the legal basis for any relationship between the exporter and the representative. Although U.S. Department of Commerce District Offices can provide counseling to firms planning to negotiate agreements with French representatives, engaging a French lawyer is *strongly* advised.

In drafting the agreement, special attention must be paid to safeguarding the exporter's interests in cases in which the representative proves less than satisfactory. Procedures and conditions for terminating the relationship should be clearly defined. Furthermore, any right to indemnification on the part of the exporter or distributor should be specified.

- Franchising

The French franchise industry is ranked first in Europe. Although it is a very competitive market, it offers many opportunities for U.S. franchises. Out of a total of 61 foreign franchises in France, 28 are American, accounting for 3 percent of the total franchise market. The market size in 2000 was USD 30 billion. The annual growth rate for 1999-2000 was 5 percent. Sales by U.S.-owned companies reached USD 900 million in 2000. Real estate has been a very successful sector, but is now very competitive. However, there remains potential for U.S. franchisors in sub-sectors yet to be fully exploited, such as specialty restaurants, business services, or, for example, renovation services.

- Direct Marketing and E-Commerce:

Direct marketing in France is a growing industry with sales to private individuals evaluated at USD 7.43 billion (FF 52 billion) in 2000. This figure includes expenses for all direct marketing media: mailings, catalogs, telephone marketing, targeted and non-targeted fliers, press and television.

Direct marketing sales are expected to grow at a rate of 2 percent per year. Mail-order sales account for 2.26 percent of total retail sales. While in recent years the mail-order market had been growing faster than that of retail business, this trend reversed for 1998-1999. Catalog sales were USD 5.2 billion (FF 36.4 billion) in 2000, representing 70 percent of the total market. This approach remains a good opportunity for U.S. companies, which ranked second after German companies in mail order sales in France with over USD 38 sold last year. The best prospects for growth are specialty catalogs which would sell apparel, books records, as well as entertainment videos, since they are the most ordered items. However, there is room for specialty catalogs that would take advantage of unexploited sectors.

E-Commerce

Direct marketing via the Internet is booming in France. Product and services sales, as well as the number of web sites on the Internet, have increased dramatically in recent years.

Retail online sales (Business-to-Consumer) during the first semester of 2000 are 270 percent higher than those made during the same period in 1999. At an estimated USD

229 million, this figure already surpasses the USD 211 million in total sales registered for all of 1999. Analysts predicted that sales would grow by 207 percent to reach USD 571 million by the end of 2000. In 2001, e-commerce is expected to account for 1 percent of all retail sales in France.

Business-to-business e-commerce has also been experiencing tremendous growth. While composed of only a fraction of the number of buyers over the Internet, B-to-B sales represented 75 percent of all e-commerce revenues in 1999. Analysts predict that they will reach USD 8.5 billion by 2003.

The total number of Internet users (15 years and older) in France has grown from 5.7 million in 1999 to approximately 10 million in the end of 2000.

The leading sectors in terms of number of sales over the Internet are Tourism, (47 percent) and Computer products and services (23 percent). Also purchased on the Internet are Books and Press (10 percent), General Distribution (7 percent), Food and Drink (2 percent), and Gifts and Flowers (1 percent).

E. Approaches to the French Market

American companies have prospered in the French market and will continue to do so if special attention is paid to their approach to the market and the products/services they offer. As outlined above, the best "first step" is to appoint an agent or distributor; however, expansion in the market can take various other forms, depending on the product/service.

- Joint Venture/Licensing

A joint venture with a French firm having similar commercial interests is one recommended approach. The French government encourages this type of investment and offers a wide range of incentives. In selecting a joint venture partner, the American company must carefully analyze its strengths and weaknesses and search for a firm that offers the appropriate support. Traditionally, a French joint venture partner strengthens the marketing activities of an American firm with its in-place distribution system. In certain industries, French manufacturers have skills that augment those of the American partner. Financing is also of special concern. Each joint venture proposal requires special analysis and conditions if it is to be successful. A joint venture with a French firm that has full French government support can be beneficial as long as manufacturing decisions can be made independently of government involvement. Recognizing the differences in each market is essential for success; consequently, it is recommended that companies interested in forming joint ventures consult with the U.S. Commercial Service at the Embassy in Paris before making any alliances.

- Steps to Establishing an Office

Establishing a subsidiary/branch office in France is also an advisable approach for some industries. The French government encourages the formation of new enterprises and, in conjunction with the Paris Chamber of Commerce and other Chambers throughout the country, offers extensive counseling and assistance to those wishing to set up an office in France. Detailed "how to" guides are available not only from the various chambers of

commerce, but also from the Commercial Service and the numerous American consulting firms present in France.

- Selling Factors/Techniques

Selling your product or service in France is similar to the United States. Buying decisions are made on the basis of quality, price and after-sales service. The principal difference in France is, in fact, the language. Since August 1994, the "Loi Toubon" requires that all advertising, labeling, instructions and promotional programs be in French. Consequently, we strongly recommend close contact with the Commercial and Agricultural sections in the Embassy, as well as arranging for local legal representation.

- Advertising and Trade Promotion

There are far too many newspapers, magazines and technical journals to list. However, judicious use of the media is an important part of any and all promotional programs. Below is a list of the most prominent general circulation French newspapers and magazines:

Le Figaro

37, rue du Louvre

75081 Paris Cedex 02

France

Tel: (33) 1.42.21.62.00

Fax: (33) 1.42.21.64.05

Web Site: <http://www.lefigaro.fr>

Yves de Chaisemartin, President and Managing Director

Patrice Duhamel, Editor

Le Monde

21 bis, rue Claude Bernard

75242 Paris cedex 05

France

Tel: (33) 1.42.17.20.00

Fax: (33) 1.42.17.21.21

Web Site: <http://www.lemonde.fr>

Jean Marie Colombani, President and Managing Director

Dominique Alduy, General Director

L'Express

17, rue de l'Arrivée

75733 Paris cedex 15

France

Tel: (33) 1.53.91.11.11

Fax: (33) 1.53.91.12.10

Web Site: <http://www.lexpress.fr>

Mr. Seillée, President and Managing Director

Denis Jeambar, Editor

Liberation

11, rue Beranger

75154 Paris Cedex 03
France
Tel: (33) 1.42.76.17.89
Fax: (33) 1.42.72.94.93
Web Site: <http://www.liberation.fr>
Serge July, CEO and Publisher

France Soir
45, avenue Victor Hugo
Bât. 265
93534 Aubervilliers Cedex
France
Tel: (33) 1.53.56.87.00
Fax: (33) 1.53.56.87.68
Mr. Boggi, President and Managing Director
Mr. Sarafini, Editor

Le Parisien
13, rue Rene-Jacques
92138 Issy-les-Moulineaux
France
Tel: (33) 1 42 23 26 00
Fax: (33) 1 41 23 26 26
Web Site: <http://www.leparisien.fr>
Benoit Luciani, General Director Marc Pellerin, Editor

International Herald Tribune
181, avenue Charles de Gaulle
92251 Neuilly Cedex
France
Tel: (33) 1.41.43.93.00
Fax: (33) 1.41.43.93.38
Web Site: <http://www.ihf.com>
Richard Woolridge, President and CEO
David Ignatius, Editor

Le Nouvel Observateur
12, Place de la Bourse
75002 Paris
France
Tel: (33) 1.44.88.34.34
Fax: (33) 1.44.88.34.01
Web Site: <http://www.nouvelobs.com>
Claude Perdriel, President and Managing Director
Jean Daniel, Editor

Le Point
74, avenue de Maine
75014 Paris
France
Tel: (33) 1.44.10.10.10

Fax: (33) 1.43.21.43.24
Web Site: <http://www.lepoint.fr>
Frantz-Olivier Giesbert, Publisher
Michel Colomes, Editor

Les Echos
46, rue la Boetie
75381 Paris Cedex 08
France
Tel: (33) 1.49.53.65.65
Fax: (33) 1 45 61 48 92
Web Site: <http://www.lesechos.fr>
David Guiraud, Publisher
Philippe Jannet, Editor

L'Expansion and La Vie Francaise
Groupe Expansion
14, boulevard Poissonniere
75308 Paris Cedex 09
France
Tel: (33) 1.53.24.40.40
Fax: (33) 1.53.24.41.05
Web Site: <http://www.lexpansion.com>
Damien Defour, President
François Roche, Editor

La Tribune Desfosses
Cote-Desfosses
42-46, rue Notre Dame des Victoires
75002 Paris
France
Tel: (33) 1.44.82.16.16
Fax: (33) 1.44.82.17.16
Web Site: <http://www.latribune.fr>
Fabrice LaRue, President and Managing Director
Philippe Mudry, Editor

Le Nouvel Economiste
10, rue de Faubourg Montmartre
75009 Paris
France
Tel: (33) 1.55.33.30.00
Fax: (33) 1.55.33.30.20
Web Site: <http://www.nouveleco.fr>
Claide Posternak, President and Managing Director
Marcel Jalvy, Secretary General

- Pricing Product

The U.S. exporter can usually determine the export price of his/her manufactured product using 70% of the domestic price (after deduction of all local marketing costs).

This will allow the French importer to price imports from the U.S. on the same price level as an American counterpart. A simple way of comparing U.S. and French retail prices consists of taking the net U.S. retail price and comparing it with the French retail price without Value Added Tax, (V.A.T.) currently 19.6%. The French consumer is generally willing to pay a maximum of 10-15% over the American retail price.

When determining the export price, it is important to consider that if prices are FOB, the French importer will have to pay for transportation, insurance, customs duties, value-added tax and fixed fees per shipment.

Terms of Payment:

For U.S. exporters, what is called "the financing of export sales" is not basically different from financing domestic sales. The fundamental concern in both cases is that one is paid in a timely manner for the goods and/or services delivered.

France's modern banking system offers a full range of payment means, the most significant of which are:

- Commercial letters of credit
- Sight and time drafts
- Bank transfers
- Certified checks

Although bank transfers and certified checks are fairly self-explanatory methods of payment, commercial letters of credit and sight and time drafts may be less familiar to the would-be exporter but are potentially attractive terms of payment.

- Sales service/Customer support:

Although less developed than in the U.S., French businesses also provide all kinds of services such as after-sales service, home delivery, maintenance contracts, warehousing facilities, hotlines, or toll free numbers for any technical assistance. For some products such as electrical appliances, e.g. TV, replacement service is available.

Logistics

Companies which wish to develop their long-term marketing and sales capabilities in France should pay close attention to securing proper distribution and storage facilities close to major airports and seaports. Logistics firms, many of which, including American-owned, operate in France and should be considered when firms develop significant market opportunities and sales channels in France. (See Chapter 11, Appendix E. Country Contacts - Logistics.)

- Selling to the Government

The French Government generally pursues procurement policies in accordance with EU regulations, which call for non-discrimination vis-a-vis foreign firms. In France, procurement regulations do not usually present barriers to entry for foreign firms.

However, local political pressure and administrative procedures are often said to favor French companies.

French Government procurement comes under the jurisdiction of the Ministry of the Economy and Finance. The "Commission Centrale des Marches" (CCM), or Central Procurement Board, has overall responsibility for monitoring compliance with procurement regulations.

France, as a member of the EU, is obliged to follow EU public works regulations which require government purchasing entities to publish tender notices for all public works projects valued at over ECU 5 million, or approximately US 5.75 million. Tender notices that exceed this threshold must be published in the Official Journal of the European Union, as well as in the French Bulletin Officiel des Annonces des Marches Publics. In the case of Telecommunications, however, a European Community Utilities Directive (January 1, 1993) requires France to give EU bidders a three percent price preference and gives France the option to reject bids with more than 50 percent non-EU content. Certain defense-related industries are also excluded from regular procurement rules. In addition, public projects must conform to the following requirements:

- A minimum of 52 days is required for bid submissions after an offer is announced.
- The reason for a bid's rejection must be provided upon request.
- The values of the winning bids must be publicly disclosed.

For information on French Government procurement regulations and procedures, contact:

CCM

Tour de Lyon
185, rue de Bercy
75572 Paris, France
Tel: (33) 1.44.87.17.17 or 1.53.17.86.69
Fax: (33) 1.53.17.87.04

Information on current and past French and EU procurement tenders and bids may be obtained through France's MINITEL service, an on-line information bank. This service offers up-to-date information and immediate access.

MINITEL Services Company
888 Seventh Avenue, 28th Floor
New York, NY 10106
Tel: (212) 399-0080
Fax: (212) 399-0129

Access to procurement tenders and bids may also be obtained by subscribing to the Official Journal of the European Union (OJEU), or the Bulletin Officiel des Annonces des Marches Publics (BOAMP). However, these publications often do not arrive from overseas in a timely manner. OJEU can be ordered from:

UNIPUB
4611F Assembly Drive
Lanham, MD 20706-4391

Tel: (800) 274-4888
Fax: (301) 459-0056
Web Site: <http://www.unipub.fr>

For subscriptions to BOAMP, contact:

BOAMP

Direction des Journaux Officiels

26, rue Desaix, France

75727 Paris Cedex 15, France

Tel: (33) 1.40.58.75.00

Fax: (33) 1.45.77.10.85

- Protecting your Product from IPR Infringement

Intellectual property consists of industrial property as well as literary/artistic property. Under the French intellectual property rights regime, patents, trademarks, and designs and models protect industrial property, while literary/artistic property is protected by copyrights.

By virtue of the Paris Convention and the Washington Treaty regarding industrial property, U.S. nationals are entitled to receive the same protection of industrial property rights in France as French nationals. In addition, U.S. nationals have a "right of priority period" after filing a U.S. patent, trademark, design or model, in which to file a corresponding application in France. This period is twelve months for patents and six months for trademarks, designs and models.

Patents

There are two types of patents: patents of invention (Brevets d'Invention) and certificates of utility (Certificats d'Utilité). Patents of invention cover all inventions. Certificates of utility cover all inventions except those of a pharmaceutical nature which are covered by complementary certificates (Certificats Complémentaires de Protection).

In order to qualify for patent protection, the invention must:

- * Have an industrial or agricultural application
- * Imply a non-obvious procedure, and
- * Have absolute novelty.

Duration: Patents for inventions have a twenty-year life span, after which they become part of the public domain. Certificates of utility have a six-year, non-renewable life span.

Patent Registration: Applications for patent registration must be filed with the French National Institute for Industrial Property, the Institut National de la Propriété Industrielle (INPI), before the invention is publicly disclosed. INPI receives applications, examines their validity, and registers the patents. After the application for a patent is filed, INPI conducts a check for comparable inventions. Upon approval and registration, a patented invention may be manufactured, operated, used or sold only with the authorization of the patent's owner. The owner can transfer, or sell the patent, or grant a license for others to use it. A patent must be used to be retained. Applicants can consult INPI's library to check for the existence of similar inventions prior to filing.

INPI

Division des Brevets
26 bis, rue de Saint-Petersbourg
75800 Paris Cedex 08, France
Tel: (33) 1.53.04.53.04
Fax: (33) 1.42.94.02.09
Web Site: <http://www.inpi.fr>

Patent protection in France may also be obtained through ownership of a European Patent, which is filed through the European Patent office in Munich:

Office Europeen des Brevets - OEB
Erhardtstrasse 27
80331 Munich, Germany
Tel: (49 89) 23 99 0
Fax: (49 89) 23 99 44 65

Patent registration in France requires a French address, which may be obtained through a legal representative in France. A list of patent advisors who can act as legal representatives can be obtained from the French Association of Patent Advisors, Compagnie Nationale des Conseils en Propriete Industrielle:

CNCPI
92, rue d'Amsterdam
75009 Paris
Tel: (33) 1.53.21.90.89
Fax: (33) 1.53.21.95.90
Web Site: <http://www.cncpi.fr>

Certificate of Utility Registration:

Certificates of Utility are also granted by INPI (see above). However, in this case, INPI does not conduct a check for comparable inventions.

Fees:

- * Patents for Inventions
 - Application fee: US\$34, which includes the first year of annual renewal fees.
 - Documentation and research fee: US\$288. This amount is to be paid at the latest one month after the application.
 - The annual renewal fee is calculated each year on a sliding scale.
 - Delivery fee: US \$77.
- * Certificates of Utility
 - Registration fee: US \$34 - Annual renewal fees are calculated on a sliding scale.
 - Delivery fee: US \$77.

Trademarks

Trademark protection can apply to both goods and services. In a general sense, trademarks recognize and protect indicators, which serve to distinguish one product or service from similar products or services. In the French regime, trademarks:

- * Can be written or designed trademarks.
- * Can be sonorous trademarks, such as musical tunes, jingles, words, slogans.
- * Must not be deceptive as to the nature or origin of the goods.
- * Must be recognizable by sight or sound.
- * Must have novelty for the specified product line.

Duration: A trademark has a ten-year life span and is renewable every ten years.

Trademark Registration: Applications must be filed with INPI, which receives applications, examines their validity, and registers trademarks. After registering the trademark, it must be publicly and unequivocally exploited for five consecutive years, or all trademark rights are forfeited. It may be sold totally or partially, by product or service category.

INPI

Division des Marques
32, rue des Trois-Fontanot
92016 Nanterre, France
Tel: (33) 1.53.04.53.04
Fax: (33) 1.49.01.07.37
Web Site: <http://www.inpi.fr>

Registration of trademarks, as in the case of patents, requires a French address, which may be obtained through a legal representative in France. A list of trademark advisors who can act as legal representatives can be obtained from CNCPI, whose address is listed above.

Fees:

- * Application fee (first registration or renewal): US 178 for up to three product/service categories; US 34 for each additional category protected.

For designs and models specifically:

- * For each photographic reproduction:
 - In Black and White: US21
 - In Color: US 41
- * For a renewal: US 23

Designs and Models

Designs and models have the following characteristics:

- * Designs are an assembly of traits or colors on the surface of an object. They constitute an original two-dimensional decoration.
- * Models are all creations (ornaments).
- * They must have absolute novelty.

Although some designs and models can be protected under patent or copyright procedures, others fall into a category, which requires special treatment. Designs or

models having an industrial function follow patent procedures, while designs or models having a purely ornamental function follow copyright procedures. Those designs or models which have both a practical and an ornamental function are subject to the following:

Duration: Infringement protection has a 25 year life span, and is renewable for another 25 years.

Registration: Exclusive proprietary rights to the design or model are acquired through the act of creation itself. Registration merely serves as proof of that creation. Designs and models are to be registered with the INPI:

INPI-Designs and Models Section
26 bis rue de Saint Petersburg
75008 Paris, France
Tel: (33) 1.53.04.53.04
Fax: (33) 1.42.93.59.30

To prove the date of creation of a design or model without formal registration, a designer may wish to use a special envelope (enveloppe speciale) for a US 11 fee. The date of creation begins when the envelope is received by the INPI.

Copyrights

Copyrights cover artistic works, literary works and software. In the French IPR regime, in order to qualify for a copyright, the language used to express the idea must be original, not the idea itself.

Duration: Copyrights are valid for 50 years after the death of the author, with two major exceptions: music copyrights are valid for seventy years after the death of the composer, and software copyrights are valid for 25 years after creation. Contrary to other copyrights, software designed by a salaried employee belongs to the employer.

Registration: Artistic and literary works are automatically protected once created and fixed in tangible form. Therefore, registration is not required, but nonetheless recommended.

For musical works, including songs, instruments, poems, sketches under 20 minutes, monologues, and other musical audiovisual productions, applications must be filed with the French Society for Musical Authors, Composers and Editors:

Societe des Auteurs, Compositeurs et Editeurs de Musique (SACEM)
225, avenue Charles de Gaulle
F-92521 Neuilly sur Seine, France
Tel: (33) 1.47.15.47.15
Fax: (33) 1.47.45.12.94
Web Site: <http://www.sacem.fr>

Membership acceptances are restricted to reputable applicants who are already known for the quality of their works. If not qualified for SACEM, applications must be filed with the National Association of Musical Authors and Composers:

Syndicat National des Auteurs et Compositeurs de Musique (SNACM)
80, rue Taibout
75009 Paris, France
Tel: (33) 1.48.74.96.30
Fax: (33) 1.42.81.40.21

For theatrical works, including plays, operas, operettas, musical comedies, films and theatrical scripts, applications must be file with the Society for Theatrical Authors and Composers:

Societe des Auteurs et Compositeurs Dramatiques (SACD)
11 bis, rue Ballu
75442 Paris Cedex 09, France
Tel: (33) 1.40.23.44.44
Fax: (33) 1.45.26.74.28

For literary works and software, applications must be filed with the French Literary Society:

Societe des Gens de Lettres (SGDL)
38, rue du Faubourg Saint-Jacques
75014 Paris, France
Tel: (33) 1.53.10.12.00
Fax: (33) 1.53.10.12.12

For documentary and educational works, applications must be filed with the Civil Society for Multimedia Authors:

Societe Civile des Auteurs Multimedia (SCAM)
5, avenue Velasquez
75008 Paris
France
Tel: (33) 1.56.69.58.58
Fax: (33) 1.56.69.58.59

Establishing an entity to do business in France does not warrant a "

- Need for Local Attorney

do-it- yourself" approach. A lawyer with experience in France should be retained as soon as the establishment of a French business entity is contemplated. The American Embassy in Paris maintains a list of American Lawyers practicing in France, which is available upon request. More detailed information about professional backgrounds can be obtained from the Martindale-Hubbell Law Directory and for the Bar Register of Pre-eminent Lawyers. Lawyers and bankers in the United States also will normally have means of recommending lawyers in France.

France has two major categories of legal practitioners:

Avocats: An "avocat" must be a lawyer. "Avocats" may render legal advice on all matters, draft agreements and contracts, handle commercial disputes and collection

cases, and plead and defend civil and criminal cases before the French courts to which they are admitted.

Notaries (Notaires): A French "notaire" is a public official appointed by the Ministry of Justice. He is not the equivalent of a public notary in the United States. The number of "notaires" in each jurisdiction is limited, and their fees fixed by law. Their functions include the preparation and recording of notarial acts (e.g., wills, deeds, acts of incorporation, marriage, contracts), the administration and settlements of estates (excluding litigation in court) and serving as the repository of wills. They are not lawyers, but very specialized members of the legal profession. They may not litigate in courts.

1. Best Prospects for Non-Agricultural Goods and Services

Listed below are 15 industry sectors which the U.S. Commercial Service at the U.S. Embassy in France considers best prospects for U.S. business; they are ranked by forecast total imports from the U.S.

Rank	Imports from the U.S.*	Sector
1	6,586	Computer Software (CSV; CSF)
2	5,500	Aircraft & Parts (AIR)
3	4,848	Industrial Chemicals (ICH)
4	4,499	Travel & Tourism (TRA)
5	4,101	Employment Services (EMP)
6	2,886	Computers and Peripherals (CPT)
7	2,460	Electronic Components (ELC)
8	1,600	Telecommunications Equipment (TEL)
9	910	Scientific Laboratory Equipment (LAB)
10	760	Medical Equipment (MED)
11	621	Pollution Control Equipment and Services (POL)
12	523	Telecommunication Services (TES)
13	427	Automotive Parts and Service Equipment (APS)
14	270	Agricultural Machinery (AGM)
15	203	Textile (TXP)
16	164	Education Services (EDS)
17	144	Plastics (PMR)
18	41	Pleasure Boats & Accessories (PLB)
19	n/a	Biotechnology (BTC)
20	n/a	Franchising (FRA)

(*) figures in USD million.

Part 1 Title: Computer Software

- a) Rank of sector: 1
- b) Name of sector: Computer Services, Computer Software
- c) ITA Industry Code: CSV, CSF

Part 2 Narrative

With over 6,000 software service firms generating USD 20 billion worth of services in 2000, France stands as Europe's largest market for software services. This market is divided into engineering and integration (23 percent); software development and technical assistance (23 percent); packaged software (22 percent); facilities management (10.5 percent); provision of services (7.5 percent); consulting (6.5 percent); call centers (3.5 percent); third-party maintenance (2 percent); and training (2 percent).

The ten largest software services firms in France are: IBM Global Services (USD 1.24 billion), Cap Gemini (USD 952 million), ATOS (USD 620 million), Bull Services (USD 608 million), IBM Software France (USD 557 million), Microsoft France (USD 454 million), Sema Group (USD 453 million), Accenture France (USD 432 million), Siemens Business Services (USD 359 million) and Hewlett-Packard Services (USD 356 million).

After experiencing double-digit growth rates (18 percent from 1997 to 1998 and 16 percent from 1998 to 1999) the French software services market slowed in 2000 with a growth of 9 percent. However, the sector is expected to generate a 13 percent increase in sales for 2001. This rebound is related to various factors, including the disappearance of local currencies in favor of the Euro in January 2002; the building up of Intranets among corporations (i.e. E-business services); the implementation of Integrated Management Products (IMPs) and additional modules; the need for greater Internet connectivity; and requirements for second-tier contracting services. Investments in E-business solutions only are expected to exceed \$2 billion in 2001 and will have an annual growth of 30 percent to 40 percent.

The growth in packaged software expenditures dropped from 13 percent in 1999 to 7.4 percent in 2000. This was due to heavy expenditures for the transition to Year 2000, followed by a drop in 2000, especially among small-to-medium sized firms. However, demand started increasing again toward the end of 2000. This market is therefore expected to grow by 11 percent in 2001. Over half of all software products in France are American-made. Firms such as IBM Software Group, Microsoft, Oracle, Computer Associates, and Parametric Technology are among the 10 largest package software firms in France, and generate combined yearly sales of USD 2 billion. Exciting opportunities therefore exist for American software vendors since they can supply software to the French market either directly through standard distribution channels or through French software services firms, which represent Europe's largest market.

Part 3 Data Table

	1999	2000	2001*
A. Total Market Size	42,879	39,386	43,468
B. Total Local Production	38,980	35,804	39,515
C. Total Exports	8,117	7,455	8,227
D. Total Imports	12,016	11,037	12,180
E. Total Imports from U.S.	6,498	5,968	6,586
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29**

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Aircraft and Parts

- a) Rank of Sector: 2
- b) Name of sector: Aircraft and Parts
- c) ITA Industry Code: AIR

Part 2 Narrative

The French aerospace industry experienced a year of remarkable growth in 2000 as orders increased to USD 34.4 billion, almost 40 percent over 1999. Orders for civil aircraft accounted for a USD 25 billion, showing a 53 percent increase over the previous year. Exports in the civil market increased 16.3 percent to USD 20 billion largely because of increased export orders for Airbus and Dassault aircraft. The French aeronautic and space industry employed 99,000 people in 2000, an increase of 2 percent over 1999. Planned increases in production rates and order books filled to high capacity will ensure continued health for the French aerospace industry in the near future.

Consolidation and restructuring continued to occur in 2000 with the creation of EADS (European Aerospace Defence and & Space company), now the largest aerospace firm in Europe, and the third largest in the world.

Orders and production rates

Airbus has begun the trend of sourcing whole assemblies and reducing its work with direct suppliers. Airbus received 520 firm orders for aircraft in 2000, a 9 percent increase over 1999, representing its second best year of sales after 1998. In 2000, 311 airplanes were delivered at an average rate of 26 aircraft per month (Toulouse and Hamburg plants), a 6 percent increase over 1999, as the company continues to step up production. Airbus expects production to increase to 38 aircraft per month by 2003. At the end of 2000, Airbus had an accumulated backlog of 1626 aircraft, representing more than 4 years of future output. This does not include orders for the A-380 super-jumbo for which 66 firm commitments from nine customers, and 50 options have been received. The Airbus factory in Toulouse will be the final assembly line for the A-380 and will undergo expansion to allow a production rate of 4 super-jumbos per month by 2006. Airbus Military Company has received 225 options from participating European nations for the A-400M military transport aircraft. The official launch of the A-400M program is expected to take place in 2001.

Dassault Falconjet is the world leader in business jets and sold 90 aircraft in 2000 compared to 72 in 1999. The Franco-Italian (50-50) consortium ATR has over 50 percent of the world's rapidly shrinking market for regional turboprop aircraft, selling 24 new and 48 refurbished aircraft in 2000. Eurocopter, which already produces over 50 percent of the world's civil helicopters, has 243 orders to produce the NH-90 military transport helicopter. The total need for NH-90 helicopters is estimated to be significant, 585 from European Union countries alone.

Airlines and maintenance

The semi-privatized national carrier Air France is still the dominant French airline. However smaller regional carriers that use regional airports as hubs are experiencing rapid growth in response to a healthy national economy. Plans are being discussed to construct a third airport in the Paris/Ile-de-France region that would accommodate an increase in flights. Maintenance support for both American and European aircraft is a large industry in France, primarily handled by two companies, Air France Industries and Sogerma.

With a solid order book for existing products and orders for new products yet to be developed, France 's aircraft industry will continue to be both an important competitor and customer for U.S. firms.

Part 3 Data Table:

	1999	2000**	2001*
A. Total market size	15,853	15,646	15,545
B. Total local production	23,447	22,851	23,000
C. Total exports	14,319	14,087	15,000
D. Total imports ***	6,725	6,882	7,545
E. Total imports from the U.S. ****	5,322	4,691	5,500
F. Exchange rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29

Figures in USD millions]

* Estimated figures.

** Although the industry recorded the highest figures ever in 2000 for rows A, B and C, it is reflected here as lower than 1999 due to conversion and high average value of the dollar in 2000.

Part 1 Title: Industrial Chemicals

- a) Rank of Sector: 3
- b) Name of sector: Industrial Chemicals
- c) ITA Industry Code ICH

Part 2 Narrative

The French chemical industry, which includes pharmaceuticals, ranks fourth in the world, with total sales of USD 73.7 billion, after the United States, Japan and Germany. In 2000, France was the third largest exporter of chemicals and pharmaceuticals, with USD 40.7 billion, an increase of 5 percent over 1999. In fact, French companies in this sector export more than they sell domestically.

Chemical sales in France slowed slightly in 2000 compared to 1999, when sales totaled USD 78.7 billion. The industry is divided into five sub-sectors, which are: basic

chemicals (including inorganic chemicals) with USD 6.2 billion in sales; specialty chemicals with USD 13 billion; fine chemicals with USD 13.5 billion; organic chemicals with USD 20 billion and pharmaceuticals with USD 21 billion

The industrial chemicals industry employs eight percent of the industrial labor force (some 230,000 employees). The French chemical industry is comprised of 2,600 companies with twenty employees or more.

Investment in research and development is still a very important aspect of this industry. The need to increase production capability to create new products, improve old ones and protect the environment, are key factors within the industry.

French exports represented USD 44.1 billion in 2000 compared to USD 43 billion in 1999, an increase of 4.4 percent. In 2000, French exports represented more than 60 percent of total sales compared to 57 percent in 1999, an increase of approximately 15 percent.

Imports also increased between 2000 and 1999, an increase of 5.6 percent (USD 34.4 billion in 1999 and USD 35.7 billion in 2000). The United States is one of France's primary suppliers of chemicals, after the United Kingdom and Germany. U.S. imports totaled USD 4.5 billion in 2000, a 12.5 percent increase over 1999.

In 2001, a slight decrease in industrial chemical sales is expected due to the downturn in the world economy, especially in the United States. European economies should also slow with an impact on the industrial chemicals industry. However, strong domestic demand should sustain the industry, and production in France should increase by 3.2 percent, compared to 4.6 percent in 2000. French exports are expected to increase by 5 percent, compared to 8 percent in 2000. Somewhat diminished economic growth in Europe, and in France, may affect imports from the United States.

Part 3: Data Table

	1999	2000	2001*
A. Total Market Size	36,698	32,353	37,006
B. Total Local Production	45,400	40,685	41,007
C. Total Exports	43,301	44,117	45,242
D. Total Imports	34,599	35,785	41,241
E. Total Imports from U.S.	4,282	4,513	4,848
F. Exchange rate USD 1.00	FF 6.15	FF 7.12	FF 7.29

(Figures in USD millions) (*) Estimated figures
(Source UIC: Union des Industries Chimiques).

Part 1 Title: Travel and Tourism

- a) Rank of sector: 4
- b) Name of sector: Travel/Tourism Services
- c) ITA Industry code: TRA

Part 2 Narrative

A record of 50.9 million international travelers visited the United States in 2000. This represents a 5 percent growth rate in arrivals to the United States. Among the top 20 markets in 2000, several countries had a record-breaking year including the United Kingdom, France, Venezuela, Netherlands, Argentina, Australia, Columbia, Israel and Sweden. According to the world international arrivals estimates for 2000 reported by the World Tourism Organization, the U.S. was the second most popular destination worldwide, behind only France, which generated 74.5 million visitors last year.

The United States remains the top choice among long-haul destinations for French travelers. Since 1985, the number of French tourists to the U.S. has more than tripled and reached more than one million in 1999.

France ranks third among the top European markets, after the U.K. and Germany, and sixth in the world after Canada, Mexico, Japan, the U.K., and Germany as an overseas source of income for the tourism industry in the United States. California, the U.S. National Parks, New York and Florida remain the favorite destinations. Increasingly, such areas as the Southwest and Mountain States are becoming popular, particularly with second- or third-time visitors. With a minimum of 5 weeks of mandatory paid vacation per year, 25 percent of the French population traveled abroad in 1999. France outbound travel is highly seasonal. The French are very individualistic in their travel behavior. The average length of stay is approximately 15 nights. Visitor spending in the U.S. amounts to approximately USD 96 per day per person.

Of the total 6,000 travel agents in France, the visit USA travel trade in France consists of about 3,900 retail agents, 50 tour operators, and 80 incentive and business/group specialists, mostly located in Paris and its region. The high value of the dollar in relation to the French Franc has had some impact on travel to the US. However, travel to more affordable U.S. destinations where there is greater value per dollar spent has helped to sustain our French tourist trade. Following the closing of the United States Travel & Tourism Administration in 1996, the Commercial Service office in Paris has supported the establishment and development of the Visit USA Committee/France, a private industry association aimed at promoting the United States as a travel and tourism destination.

Part 3 Data Table

	1999	2000	2001
A. Total Market Size	96,000	99,840	102,336
B. Total Local Production	108,300	111,592	114,939
C. Total Exports	31,500	33,062	34,701
D. Total Imports	19,200	20,173	20,778
E. Total Imports From U.S.	3,800	4,135	4,499
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.12**	FF 7.29**

(Figures in USD millions) (*) Estimated figures; (**) USD/FF Exchange rate for year 2000 and 2001 is much higher than for years 1999.

Part 1 Title: Employment Services

- a) Rank of sector: 5
- b) Name of sector: Employment Services
- c) ITA Industry Code: EMP

Part 2 Narrative

Unemployment continues to be a major concern in France. However, for the first time in a decade, the rate of unemployment has been steadily decreasing. France's unemployment rate fell to 8.7 percent in April 2001 with a total number of 2,075,400 job seekers in France. This significant change is the result of the recent growth in the French economy and, to some extent, results from the law establishing a 35-hour workweek.

Temporary help services:

France has the largest temporary help market in Europe, benefiting from the recent growth of the French economy (plus 3 percent). The temporary employment industry experienced in 2000 a more than 20 percent increase in the number of job placements compared to 1999.

France currently has 4,400 temporary help agencies, and 605,000 temporary employees were registered in 2000, which represents an increase of 15 percent over 1999. The French temporary employment market turnover (VAT excluded) increased by over 20 percent since 1999 (from FF 98.8 billion in 1999 to FF 118.6 billion in 2000).

Those who use temporary employment are primarily divided among three sectors. These include the industrial sector (314,600 temporary employees in 2000, representing an increase of 18 percent over 1999), services sectors (187,550 temporary employees in 2000, an increase of 24 percent over 1999), and the construction sector (102,850 temporary employees in 2000, an increase of 10 percent over 1999).

Over the last 10 years, the temporary employment industry has become more concentrated, with small agencies consolidating into large, more powerful companies. The temporary employment market is composed of large groups of companies such as ADECCO, which continues to dominate the French market, followed by ADIA, MANPOWER, VENDIOR BIS, SYNERGIE and RANSTAD INTERIM.

Recruitment firms:

The year 2000 has been flourishing for the recruitment sector. Job placements increased drastically in the third trimester of 2000 up almost 90 percent over the same period in 1999. Recruitment firms have reported that 28 percent of placements were related to new job positions. The heavy industry and services sectors have been the highest number of placements.

Demand for commercial and marketing director positions has increased, and represented 23% of the total recruitment in the third trimester of 2000. Showing a much smaller growth is the recruitment of manager positions in human resources and computer technology. Decreasing substantially were the percentage of new-hires going

into general manager positions in the bank and insurance sector, representing only 3 percent of total recruitment.

Major U.S. executive search companies, such as Spencer Stuart, Russel Reynolds, and Boyden Executives Search, are already present in France and enjoy a good reputation.

Recruitment via the Internet has become an effective tool for French firms. The majority of professionals in all industries use the Internet to retrieve and submit applications. In July 2000, 43 percent of recruitment firms in France published their job announcements on their web sites, compared to 37 percent in September 1999. American firms specializing in this field may want to take advantage of this new trend to enter the French market.

There are no trade barriers to access to the French employment services.

Part 3 Data Table

	1999	2000*	2001*
A. Total Market Size	17,168	17,965	19,529
B. Sales by Domestic Firms	12,017	12,570	13,670
C. Export Sales	1,716	1,796	1,952
D. Sales by foreign-owned firms	2,575	2,695	2,929
E. Sales by U.S. owned firms	3,605	3,773	4,101
F. Exchange rate	FF 6.10	FF 7.00	FF 7.29

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Computers and Peripherals

- a) Rank of sector: 6
- b) Name of sector: Computers and Peripherals
- c) ITA Industry Code: CPT

Part 2 Narrative

In spite of the dot.com crisis that has affected the information technology sector on a global in 2000, the French information technology market has remained stable and ranks second in Europe and fourth in the world. It is estimated at USD 60 billion and continues growing at an annual rate of 9 percent.

Significantly, in 2000, France caught up to its Northern European neighbors with regard to Internet use. More than 3,600 French businesses now sell over the Internet, a 70 percent increase over the previous year, and 23.5 percent of the French, or 14 million people, are now connected to the Internet. Connections to the Internet should increase by 80 percent over the next two years. This trend has been driven by reductions in PC prices and lower rates for ISP subscriptions. E-commerce transactions should reach

USD 40 billion by 2003. Already in 2001, one Internet user out of five makes purchases using the Internet.

The five largest suppliers of computer hardware in France are IBM, Bull, Compaq-Digital, Hewlett-Packard and ICL. The market for Internet/Intranet applications servers should exceed USD 2 billion in 2002, compared to USD 32 million in 1999. This high growth rate is due to the fact that corporations realize that Internet connectivity is vital to their competitiveness in global markets.

France currently accounts for 19 percent of the overall European PC market, which grew by 12 percent in volume in 2000. PC sales in 2000 were approximately 6 million units (USD 5 billion), and thirty percent of the French households now own a PC. A remarkable growth took place in the server and portable market - nearly 40 percent. The portable market is primarily supported by professional sales, which grew by 20 percent against 5 percent for individual sales. Overall sales of portables went from 540,000 in 1999 to 700,000 in 2000. This represents a growth that is double compared to that of desktop PCs. Because of an overall economic slowdown in the information technology markets, a new pricing war is raging among PC manufacturers, with Dell taking the lead by decreasing its PC prices.

The best prospects for companies seeking to enter the French market include PCs with enhanced CD-ROM/DVD and Internet capabilities; video-conferencing equipment; electronic document processing equipment; flat monitors; portable computers including laptops, notebooks, and palmtops; ink-jet printers; high-speed modems; and wireless LAN communication equipment

Part 3 Data Table

	1999	2000	2001*
A. Total Market Size	18,142	16,923	18,015
B. Total Local Production	10,921	10,187	10,844
C. Total Exports	852	795	846
D. Total Imports	8,073	7,531	8,017
E. Total Imports from U.S	2,907	2,711	2,886
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29

(Figures in USD millions); (*) Estimated figures.

Part 1 Title: Electronic Components

- a) Rank of sector: 7
- b) Name of sector: Electronic Components
- c) ITA Industry Code: ELC

Part 2 Narrative

The French microelectronics market has experienced record breaking growth for the past two years largely due to the cellular telephone explosion. However, the market is

expected to demonstrate more moderate growth in the near future, as demand for telecommunications equipment has recently decreased. Nevertheless, certain niche market sectors still offer promising opportunities.

The passive component market is estimated to grow by approximately 7 percent in 2001, after 7 years of double-digit growth. Most forecasts are optimistic as only 25 percent of passive components are sold to the cellular telephone manufacturing industry, demand for which has temporarily dropped. Most other sectors using passive components, such as the automobile, consumer electronics, computer, professional equipment, heavy industry and medical industries, remain stable.

The consumer market still generates strong demand for electronic components. Innovative digital products and technologies such as the Internet, DVD (Digital Versatile Disc) and GPS (Global Positioning System) will continue to represent valuable market opportunities.

France is a dominant force in the European defense electronics industry as well as a major player in the world market. Currently, the French defense electronics industry is responsible for 52 percent of European defense electronics production. France is the leading European exporter of radar and communication equipment. Moreover, the communications and radar sector, which consists of radio and telecommunications, navigational instruments, and other military equipment, accounts for nearly 22 percent of the French electronics industry.

France has a world class automotive industry, which manufactures nearly 4 million vehicles per year. As the content of electronics in automobiles increases substantially over the next 5 to 10 years, the French automotive equipment industry should offer a myriad of business opportunities for electronic component suppliers. Intelligent airbags, speed control radar, anti-collision and stationary object detection devices are just a few of the technological advances coming to the fore to reshape the industry. It is estimated that the French automotive market for semiconductors alone will be worth USD 15 billion by 2004.

Part 3 Data Table

	1999	2000*	2001*
A. Total Market Size:	7,759	7,991	8,100
B. Total Local Production:	8,987	9,257	9,360
C. Total Exports:	9,040	9,311	9,320
D. Total Imports:	7,413	7,635	8,060
E. Total Imports from the US	2,297	2,343	2,460
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29*

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Telecommunications Equipment

a) Rank of sector: 8

- b) Name of sector: Telecommunications Equipment
c) ITA Industry Code: TEL

Part 2 Narrative

The French telecommunications industry is a leader in world markets. Globally, France's Alcatel ranks among the top-five telecommunications equipment manufacturers, while France Telecom ranks among the top five telecommunications operators. France has a long history of high-tech research and development, and is open to new technology. France spends proportionally more on R&D than any other nation, except for Japan. American companies have found skilled engineers in France. The areas of Sophia-Antipolis (Nice) and the *Silicone Sentier* (Paris) have proven to be the French version of the high-tech Silicon Valley.

Future market growth is expected to result as new telecommunication operators invest in infrastructure and equipment, existing operators continue to maintain and reinvest in their systems, and demands for high speed Internet access stimulate a need for new technologies. The UMTS licenses awarded to France Telecom and Cegetel SFR in June 2001, will create a need for new services. Other companies, like Bouygues Telecom plan to offer services competitive with 3-G innovations, without changing to UMTS. It is expected that Bouygues and other operators will be candidates in the UMTS licensing round in 2002.

Infrastructure changes in telecommunications voice and data transmission will stimulate greater competition in France. More than 98% of phone lines already have digital network capabilities. Underwater cables are expanding the capacities of terrestrial communications, in addition to those that are developing via satellite. France Telecom and its competitors are developing faster, more efficient networks that will have greater Internet and information transportation capabilities. The arrival of the next generation satellite networks will allow competitors to bypass the local loop without requiring circuit switching. Currently France Telecom retains a hold on fixed-line clients through its ownership of the last local-loop. The telecommunications regulating body in France (Autorite de Regulation des Telecommunications) has recently stated that competition on the local loop is essential for the development of the telecommunications and information technology sectors in France. Therefore, it is expected that this market will be opened sometime in the near future.

The penetration rate for mobile phones in France has now exceeded 50 percent of the population, with 31 million subscribers among the three major operators. This number is expected to reach 40 million by 2002. By the year 2004, 30-50 percent of business-to-business transactions in France are expected to be on mobile devices. Devices such as palm pilots are now increasingly linked to other products such as mobile phones and PCs. Therefore, as the use of these products grows, demand for digital devices will increase. Through intensified marketing efforts, and increasing deregulation, American companies are finding the French telecommunications equipment market more accessible and full of potential. As American suppliers have a reputation for product reliability, quality, service and price, they should find expanding opportunities in this sector in France. Services and products imported from the US must be adapted to French standards, language, and usage, in order to be successful in the French market.

Part 3 Data Table

	1999	2000	2001*
A. Total Market Size	10,100	12,900	14,200
B. Total Local Production	13,500	17,100	18,700
C. Total Exports	7,900	10,000	11,200
D. Total Imports	4,400	5,300	6,100
E. Total Imports from U.S.	1,100	1,500	1,600
F. Exchange Rate: USD 1.00=	FF 6.15	FF7.12	FF 7.29

(Figures in USD millions) (*) Estimated figures

Part 1 Title: Scientific Laboratory Equipment

- a) Rank of sector: 9
- b) Name of sector: Laboratory Scientific Instrumentation
- c) ITA Industry Code: LAB

Part 2 Narrative

The forecast for the French scientific laboratory equipment market remains positive for the next several years. With its top-notch research facilities, nearly 2000 laboratories, and internationally competitive pharmaceutical, chemical, agriculture, environmental and biotechnology industries, France offers numerous opportunities for U.S. scientific laboratory equipment manufacturers.

The private sector remains the primary driving force behind this industry's dynamic growth. The long-term outlook is very promising, particularly in the agriculture/food processing, pharmaceutical, environmental technology and biotechnology industries.

France has developed a world class biotechnology industry ranking fourth worldwide in number of biotechnology patents granted annually. It generates an annual turnover of nearly \$ 2 billion and has seen a large increase in the number of biotech firms. With approximately 250 firms operating in France, the French biotechnology industry now employs more full-time researchers than any other country in Europe except Germany. France is also considered the best country in Europe for biotech capital investment. As a result, demand for high performance spectrometry and automative laboratory equipment

in the biotechnology field is expected to grow by 15 to 20 percent over the next several years.

New European Union directives and French environmental regulations continue to play an important role in the development of innovative analytical instrumentation and environmental technologies. Consequently scientific laboratory equipment used to comply with environmental standards will remain in high demand.

France's agriculture and food industry is valued at USD 135 billion, which represents a major source of income for the French economy. Therefore, this industry takes great precautions to guarantee the quality and safety of its products. Recent occurrences of Mad Cow's Disease and Hoof-and-Mouth Disease have shaken consumer confidence and jeopardized the food industry's reputation for high safety standards. Consequently, analytical and testing instrumentation for food products that provides both rapid and accurate results is at a premium.

Part 3 Data Table

	1999	2000*	2001*
A. Total Market Size:	2,595	2,699	2800
B. Total Local Production:	964	993	1060
C. Total Exports:	749	771	810
D. Total Imports:	2,380	2,428	2550
E. Total Imports from the U.S	849	866	910
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Medical equipment

- a) Rank of sector: 10
- b) Name of sector: Medical Equipment
- c) ITA Industry Code: MED

Part 2 Narrative

The French medical sector continues to grow, reflecting population growth and longer life expectancy in France.

The emergence of new technologies, such as same-day surgery, has generated a new market for home health care equipment. Although the development of such alternatives has caused a decline in the market for hospital-care equipment, it has created a demand for a whole new range of medical equipment.

Major characteristics of the French healthcare system that influence the market include the fact that virtually the entire population of France is covered by the "social security" (medical insurance) system; that the government has created a framework for healthcare in which public and private hospitals work in a complimentary way to provide

the population with easy access to healthcare; that both public and private hospitals are subject to government approval for their location, development and major medical equipment investments; that for each medical specialty there are bed/population ratios which have a direct impact on these approvals; and that the individual patient is free to choose treatment in either a public or private hospital.

Approximately 70 percent of all French medical costs are reimbursed. Attempts by the French government to control medical costs create strong opposition from the public, and from medical professionals.

Since June 1998, as in the rest of Europe, all medical devices sold in France must bear the CE Mark. In France, the medical equipment sector is highly dependent on imports, mainly from the U.S., followed by Germany, Japan and Italy.

Part 3 Data Table

	1999	2000*	2001*
A. Total Market Size	3,980	4,090	4,330
B. Total Local Production	3,550	3,650	3,870
C. Total Exports	1,750	1,830	1,940
D. Total Imports	2,180	2,270	2,400
E. Total Imports from U.S.	700	720	760
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Pollution Control Equipment and Services

- a) Rank of sector: 11
- b) Name of sector: Pollution Equipment Control
- c) ITA Industry Code: POL

Part 2 Narrative

The French environmental technologies (ET) market has expanded over the past several years and is expected to grow by approximately 5.7 percent in 2001. A growing economy, healthy financial institutions, stronger European Union (E.U.) regulations and the increasing costs associated with polluting have played a major role in an expanding market for environmental technologies. In addition, greater interest in complying with environmental regulations by national and local government officials has also stimulated this market.

The air pollution control market remains one of the most dynamic markets within the ET sector and is currently worth approximately USD 591 million. The market has grown nearly ten percent yearly over the course of the last few years and is expected to maintain this growth into the near future. The principal forces behind the market expansion include the upgrading of municipal waste and fuel blending incinerators to comply with stricter EU regulations (treatment of dioxins and furans). Moreover, ISO

14000 certification, which requires more accurate analytical instrumentation, and equipment maintenance and replacement, has also been a driving force in stimulating market demand.

The market for dedusters, gas scrubbers and gas purification systems in France offers the greatest opportunities for U.S. companies in the air pollution control industry. Ten - percent growth for 2001 is expected, after two years of double-digit growth -- 14 percent in 1999 and 17 percent in 2000. A need for continuous automatic air ambient analyzers that monitor Volatile Organic Components (VOC), benzene, Polycyclical Aromatic Hydrocarbons (PAH) and heavy metals will also provide market opportunities in the near future.

The French water treatment market is expected to show strong signs of growth over the next several years. European legislation has created high standards for water treatment, which will entail considerable investment, construction and upgrading. A 1991 European Union directive and the French "law about water" require that water treatment systems be established throughout all of France by 2005. Cities with more than 15,000 inhabitants will have to be equipped with sewage plants by 2001 while cities with a population of 2000 to 15,000 will have until 2006. All lead pipes for potable water will also have to be replaced within this timeframe. This EU directive is expected to stimulate a growing market for the next 10 years.

Part 3 Data Table

	1999	2000*	2001*
A. Total Market Size:	24,151	20,531	21,138
B. Total Local Production:	27,136	22,490	22,950
C. Total Exports:	8,040	6,738	6,750
D. Total Imports:	5,055	4,779	4,938
E. Imports from U.S.:	618	620	621
F. Exchange Rate: USD 1.00	FRF 6.15	FRF 7.12	FRF 7.29*

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Telecommunication Services

- a) Rank of sector: 12
- b) Name of sector: Telecommunications Services
- c) ITA Industry Code: TES

Part 2 Narrative

French consumers are sophisticated and are comfortable with new technologies, and adapt well to new applications and high tech products. This is, in part, due to the Minitel service (the French videotext service), which has been used for twenty years and turned France into a computer-literate society long before the rest of the world. Consequently,

after some delay caused by the process of moving from the Minitel to the Internet, the French are now enthusiastically embracing the Internet.

Major changes in telecommunications infrastructure in France are driving the French Internet revolution. The telecommunications industry was deregulated in 1998. Almost all fixed telephone lines are now digital. The former state monopoly, France Telecom, still dominates the local loop market, although several competitors have established competitive niches. The French telecommunications market grew by over 17 percent in 2000, totaling over USD 32 billion. Foreign—including American—competitors have been able to gain a significant share of this expanding market. On the other hand, American online sellers have not been as active as could be expected in the French market.

It is possible that no other country in the European Union may provide better commercial opportunities for companies engaging in electronic-commerce than France. In addition, a subset of this sector, known as mobile commerce (m-commerce) is full of potential as a result of the deep penetration (50 percent) of mobile phones and desire for Internet capabilities. For example, in the past year, there were more than 3,600 French businesses selling over the Internet, a 70 percent increase over the previous year. The home banking and e-brokerage markets have experienced dramatic growth in France as well, in spite of general slowing of activity in the financial services.

The new third generation wireless phones, or UMTS (Universal Mobile Telecommunications Services) technology, will further stimulate telecommunications competition. The first round of licensing took place at the beginning of June 2001, with France Telecom and Cegetel SFR, the two largest French mobile service providers, receiving UMTS rights. The licensing fees were 35.2 billion French Francs (USD 4.6 billion). The third largest provider, Bouygues, felt it could offer competitive services without adopting UMTS immediately. Instead it will probably be a candidate in the second round of UMTS licensing scheduled for 2002. The new generation of services available through UMTS will revolutionize the capabilities of mobile handsets, creating a growing market for telecommunication service providers.

Part 3 Data Table

	1999	2000	2001*
A. Total Market Size	44,784	55,071	61,887
B. Total Local Production	41,533	49,487	55,377
C. Total Exports	1,137	1,273	1,592
D. Total Imports	4,388	4,311	4,918
E. Total	377	476	523

Imports
from U.S.
F.
Exchang
e Rate:
USD
1.00

FF 6.15 FF 7.12 FF 7.29

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Automotive Parts and Service Equipment

- a) Rank of Sector: 13
- b) Name of sector: Automotive Parts/Service Equipment
- c) ITA Industry Code: APS

Part 2 Narrative

Original equipment (OE) suppliers witnessed overall turnover increase 10 percent to reach USD 33 billion in 1999, and through the first nine months of 2000 have seen OE sales rise 7.7 percent. A particularly strong export market helped to fuel domestic production. European Union markets accounted for 84.9 percent of French OE exports, as vehicle production in E.U. countries increased during 2000. Overall vehicle production in Europe is expected to remain stable, though some industry forecasts call for a minor decrease in overall vehicle production in 2001, as vehicle sales show weaker growth.

German automotive equipment imports dominate this segment with a 40 percent share, far ahead of those from Spain, Italy, and the U.K. respectively. The U.S. share of the import market, on the other hand, is significantly lower than its European counterparts, representing roughly 4 percent of the import market.

Despite this strong competition from E.U. manufacturers, the French market remains highly-receptive to U.S. automotive parts and services imports, particularly higher-end, innovative equipment and services. It is important to note that the high-percentage of diesel engines (roughly 40% of the car park and rising) represents an ever-growing market opportunity for new replacement diesel parts and diesel diagnostic servicing equipment. In addition, as E.U. environmental legislation tighten, emission and fuel efficiency technologies are becoming important high-growth sectors open to new outside competition.

Part 3: Data Table

	1999	2000	2001*
A. Total Market Size	33,211	35,590	38,178
B. Total Local Production	38,450	40,740	43,120

C. Total Exports	15,737	16,540	17,400
D. Total Imports	10,498	11,390	12,458
E. Imports from U.S.	373	398	427
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29**

(Figures in USD millions) (*) Estimated figures; (**) USD/FF Exchange rate for year 2001 is higher than for years 1999 & 2000.

Part 1 Title: Agricultural Machinery

- a) Rank of sector: 14
- b) Name of sector: Agricultural Machinery and Equipment
- c) ITA Industry Code: AGM)

Part 2 Narrative

After six consecutive years of annual growth, the French agricultural machinery market faced a severe slowdown in 2000.due to several factors, including the following: The large level of investments made over the past six years, following the slump of the early 1990s; the EU mandated decrease in grain prices; the consequence of the major storm that hit France in December 1999; and the outbreak of mad cow disease and food-and-mouth disease.

Sales of agricultural machinery decreased by 3 percent in 2000 compared to 1999. The trend is confirmed for 2001 as the first quarter showed a drop in sales of 2.7 percent compared to 2000. Sales are expected to decline this year between 10 and 25 percent, depending on type of the equipment. The only sectors experiencing some growth are winemaking, landscaping, and forestry equipment.

Nevertheless, France remains the top market in Europe for agricultural machinery, with total sales close to USD 4 billion representing about 9 percent of the total market worldwide. France is the leading producer of agricultural goods in Western Europe and the second largest agricultural exporter in the world after the U.S. Approximately 700,000 farmers hold 96 percent of the arable land in France.

The European Union (EU) reforms of the Common Agricultural Policy (CAP) most recently in 2000, led to a reduction of price supports, which may force heavily subsidized farms out of business. With the advent of these reforms, farmers are not expected to regain sufficient confidence to invest heavily in machinery in the short-to-medium term. However, new environmental regulations to deal with soil erosion, engine emissions, and water pollution could help increase the replacement of machinery over the long term.

Part 3. Data Table

1999	2000	2001*
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A. Total Market Size	4,130	3,379	3,250*
B. Total Local Production	2,932	2,382	2,250*
C. Total Exports	1,212	1,022	1,000*
D. Total Imports	2,410	2,019	2,000*
E. Total Imports from U.S.	311	273	270*
F. Exchange Rate:USD 1.00	FF 6.15	FF 7.12	FF 7.29**

(Figures in USD millions) (*) Estimated figures; (**) USD/FF Exchange rate for year 2001 is higher than for years 1999 & 2000.

Part 1 Title: Textile

- a) Rank of sector: 15
- b) Name of sector: Textile Products – Made-up
- c) ITA Industry Code: TXP

Part 2 Narrative

In 2000, the French textile market totaled USD 36.4 billion, with apparel representing 74 percent of the market, technical textiles, 15 percent, and household textiles, 11 percent.

The apparel market (USD 26.9 billion) is divided into:

- Women's wear, representing 53 percent;
- Men's wear, representing 33 percent;
- Children's wear, representing 14 percent.

In 2000, France's major suppliers of textiles (including apparel, technical and household textiles) were mainly European Union (EU) countries, including Italy (16 percent), Spain and Portugal

(9 percent, Belgium/Luxembourg (8.3 percent), Germany (8.3 percent), United Kingdom (4 percent), followed by China (6.5 percent), Turkey (5 percent), Morocco (3.5 percent), and India (3.4 percent). It is important to note that, recently, Eastern European countries are gaining importance in terms of market share because of their ability to provide low-production costs.

In 2000, American textile exports to Europe represented 1.1 percent of total imports (USD 200 million). These imports were mainly composed of sportswear and technical textiles. French consumers are becoming very receptive to U.S. fashion, and, therefore American companies are expected to increase their market share. In addition, American technical textile manufacturers have a strong reputation for technological know-how. They are introducing a new generation of fibers and textiles corresponding to the needs of new consumers (i.e.: easy-to-clean, anti-bacterial, anti-uv, anti stain, anti odor, insect-protection, waterproof, temperature-control, and light-weight).

Part 3 Data Table

	1999	2000	2001*
A. Total Market Size	37,073	36,400	37,128*

B. Total Local Production	31,545	32,100	32,714*
C. Total Exports	12,357	12,600	12,915*
D. Total Imports	17,885	18,300	18,700*
E. Total Imports from U.S.	.201	.201	.203*
F. Exchange Rate :USD 1.00	FF 6.15	FF 7.12	FF 7.29**

(Figures in USD millions) (*) Estimated figures; (**) USD/FF Exchange rate for year 2001 is higher than for years 1999 & 2000.

Part 1 Title: Education Services

- a) Rank of sector: 16
- b) Name of sector: Education/Training
- c) ITA Industry sector: EDS

Part 2 Narrative

Education abroad has increasingly become an important factor for French university graduates seeking to stand out in the employment market, especially with the expansion of the European Union. English is now effectively the business language of Europe.

Excellent opportunities exist for U.S. schools wishing to expand their enrollment of French students. A select number of undergraduate and graduate students prefer to go abroad to expand their university and post-graduate training and experience. For the academic year 1999/2000, over 14,000 student and exchange visas were issued in France for the United States (6,877 of which were student visas). This is an increase of 10.2 percent over the previous year and generated more than USD 164 million in revenue due to tuition and living expenses. France ranks third in Europe, after Germany and the United Kingdom, as a source of students for U.S. educational institutions, and fourth overall behind China.

Opportunities for U.S. schools are expected to continue growing due to the favorable view of the French toward studies in the United States. Campus life and the possibility of a specialized and focused curriculum contribute to the success of American educational services in France.

Best prospects within this sector include: intensive "American" English language training programs (summer programs for students or adults); programs in business administration; one-year university programs for French high-school graduates (*post-baccalaureate*) usually between graduation and entry into French university; secondary boarding schools; work/study programs (internships); academic summer camps; and undergraduate and graduate degrees in such subjects as engineering, medicine, sciences, law, communications, marketing, management and computer sciences.

Part 3 Data Table

	1999	2000	2001
A. Total	106	118	120

Market Size (USD billions)			
B. Total Local Producti on (USD billions)	108	114	115
French & Foreign Students in France (thousan ds)	1,430	1,450	1,450
C. Total Exports (USD millions)	304	312	316*
Foreign Students in France (units)	33,250	36,500	40,000
D. Total Imports from U.S. (USD millions)	156	160	164
French students in U.S. (units)	6,877	7,592	8,382
E. Total Exports to U.S. (USD millions)	164	170	182
U.S. Students in France (units)	10,479	11,233	12,042
F.	FF 6.15	FF 7.12	FF

Exchange
Rate
(USD
1.00)

7.29

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Plastics

- a) Rank of sector: 17
- b) Name of sector: Plastic Processing
- c) ITA Industry sector: PMR

Part 2 Narrative

With 4000 firms employing over 146 000 persons and generating a turnover of USD 21.48 billions in 2000, the French plastics processing industry ranks fourth in the world after that of the United States, Japan and Germany. This market is broken down as follows: industrial parts (34 percent), packaging (26 percent), films, sheets and pipes - also described as 'semi-finished products' (18 percent), construction components (15 percent) and consumer products (7 percent).

Over the last 5 years, this industry has enjoyed a 25 percent growth, i.e., an average annual growth rate of 6 percent. 1998 proved a very good year, with a turnover growing by 10 percent. Growth slowed to the industry's average 6 percent in 1999 before dropping to 5 percent growth in 2000. The market is anticipated to grow by 5 percent in 2001, its most dynamic sectors remaining industrial parts, especially for the car industry, and building materials.

Raw materials cost accounts for 36 to 44 percent of industry turnover. Since March 2000, the price of these materials has increased by 25 percent, putting the margins of plastics converters under great pressure since severe competition prevents them from increasing their own selling prices. As a result, investments in new equipment, machinery and technologies are essential for increasing productivity. These investments amount to 6 percent of the industry's turnover. Environmental laws - at the national and European level - have lead the industry to develop programs to manage the environmental impact of their production sites and of their products (e.g., eco-design, recycling).

Since 1998, the industry's balance of foreign trade has been negative this deficit appears to be growing. Germany remains France's major supplier and customer. Italy is France's second biggest supplier of plastic products.

The French plastics processing industry offers niche-market opportunities for US raw materials state-of-the-art machinery and innovative technologies (however, the current strength of the US dollar has had a dampening effect on plastics exporters).

Part 3 Data Table

	1999	2000*	2001*
A. Total Market Size	24,460	23,180	23,730
B. Total Local Production	23,080	21,480	22,030
C. Total Exports	4,990	4,700	4,800
D. Total Imports	6,370	6,400	6,500
E. Imports from the U.S.	157	133	144
F. Exchange Rate (USD 1.00)	FF 6.15	FF 7.12	FF 7.29

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Pleasure Boats and Accessories

- a) Rank of sector: 18
- b) Name of Sector: Pleasure Boats and Accessories
- c) ITA Industry Code: PLB

Part 2 Narrative:

The French pleasure boat industry is the largest in the European Union and the second largest worldwide after the United States. It accounts for nearly one-third of the European nautical market's turnover, and overall, the French nautical industry supplies one-fifth of the European fleet. Total sales accounted for approximately USD 2.5 billion in 2000.

Western Europe remains the largest market for U.S. boat manufacturers, as it accounts for more than half of the U.S. pleasure boat exports revenues. Traditionally, the biggest markets are Italy, the United Kingdom, Finland, the Netherlands, Germany, followed by France which is increasingly becoming a strong market for U.S. exporters of pleasure boats.

Part 3 Data Table:

	1999	2000	2001*
A. Total Market Size	470	511	536
B. Total Local Production:	593	619	676
C. Total Exports:	472	469	520
D. Total Imports:	349	361	380
E. Total Imports from the U.S.	38	39	41
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29

(Figures in USD millions) (*) Estimated figures.

Part 1 Title: Biotechnology

- a) Rank of Sector: 19
- b) Name of sector: Biotechnology
- c) ITA Industry Code: BTC

Part 2 Narrative

Over the last two decades, France has developed into a significant base for European biotechnology. During the 1990's, biotechnology was identified as an area with the potential to deliver substantial benefits to society, and to contribute significantly to the country's economy. Currently, there are approximately 250 companies with biotechnology activities, eight of which are quoted on the French stock market. The French biotech industry is the third largest in Europe in terms of the number of active companies. Only the U.K. & Germany have larger sectors. Turnover in the French biotechnology sector is estimated at USD 1.7 billion.

The biotech industry is one in which public and private sector interests work closely together, resulting in effective regulatory structures and relatively open dialogue among industry, consumers, and environmental groups. France has developed strict but workable legislation for biotechnology, which strives to guarantee a high level of safety for humans, animals and the environment. As a result, France has taken a leading role in stimulating constructive, open and clear dialogue between industry and social critical organizations, concerning the introduction of new biotech products.

France's service and supplier base is well-equipped to assist biotechnology companies with a range of activities. Third party providers and a full range of consultants offer companies product development assistance, manufacturing of batch products for safety testing or clinical trials, and advice on juridical and regulatory affairs, logistics, patenting, marketing and export issues.

Since biotechnology deals with processes rather than products, no generally applicable statistics and estimates of market growth can be reliably provided.

Part 3 Data Table:

	1999	2000**	2001*
A. Total Market Size*	1,650	1,700	1,750
B. Total Local Production*	1,450	1,500	1,550
C. Total Exports*	n/a	n/a	N/a
D. Total Imports*	n/a	n/a	nN/a
E. Total Imports from the U.S.*	N/a	N/a	N/a
F. Exchange rate: USD 1.00	FF 6.15	FF 7.12	FF 7.29

[Figures in USD millions]* Estimated figures.

Part 1 Title: Franchising

- a) Rank of sector: 20
- b) Name of sector: Franchising
- c) ITA Industry Code: FRA

Part 2 Narrative

The French franchise industry is ranked fourth in the world and first in Europe. It has been growing steadily over the last several years, over the last four years, franchises in France have grown an average of 3.75 percent. In the year 2000, 205 franchisers opened 2,659 franchises creating 12,126 new jobs. With 571 franchisers and 31,781 franchisees as of January 1, 2001, the French market is valued at USD 30.5 billion (FF 214 billion) and accounts for approximately 6 percent of the total retail and service markets.

The main sectors of the industry include the commercial sector (53.7 percent), the services sector (31.7 percent) and the hotel/restaurant sector (11.5 percent). Changes in different areas of the French franchise market reveal consumer behavior trends. In the year 2000, the most new franchising jobs were created in the non-food retail trade sector with 4221 jobs created, followed by the services sector with 3887 new jobs. The specific markets showing the most potential are real estate agencies, convenience stores and hair salons. In the retail sector, traditionally independent shops have been closing to make room for franchise networks. While the hotel/restaurant sector has recently not been performing as well as other sectors, the increasing success of fast food and theme restaurants is contributing to a revival of this sector. The current popularity of theme restaurants demonstrates consumer preference for a pleasant, slightly unusual, restaurant atmosphere.

While French entrepreneurs are attracted to franchising and look to the U.S. for advanced, profitable and innovative franchising formulas, French franchise formulas, especially in the commercial sector, are still dominant in France. In terms of the foreign-owned franchise market, U.S. companies dominate with a 52 percent market share. Yet, sales by U.S. franchises account for only 3 percent of the total French franchise market. Foreign-owned franchises in France are mainly in the services and hotel/restaurant sectors and were well-established in their respective countries before

entering the French market. U.S. companies possess special advantages including superior know-how of network development, delivery speed, good service and competitive prices, although high franchise entry fees have been a stumbling blocks in some instances. Consequently, they can expect to do well in franchise sectors not yet exploited, as well as in competitive markets, when offering a good price/quality ratio.

Part 3 Data Table

	1999	2000*	2001*
A. Total Sales	33,171	30,454	30,823
B. Sales by Domestic Firms	31,253	28,694	28,973
C. Sales by Foreign-owned Firms	1,914	1,757	1,775
D. Sales by U.S-owned Firms		996	914**
924			
E. Total Imports from the U.S.		n/a	n/a
n/a			
F. Exchange Rate: USD 1.00	FF 6.15	FF 7.00**	FF
7.29			

(Figures in USD millions) (*) Estimated figures.

2. Best Prospects for Agricultural Products

Significant market opportunities for consumer food/edible fishery products exist in a number of areas: fruit juices and soft drinks (including flavored spring waters, dried fruits and nuts, fresh fruits and vegetables (particularly tropical and exotic), frozen foods (both ready-to-eat meals and specialty products), snack foods, tree nuts, "ethnic" products, seafood (particularly salmon), innovative dietetic and health products, organic products, soups, breakfast cereals and pet foods. In addition, niche markets exist in France for candies, chocolate bars, wild rice and kosher foods which have shown a rising demand. Market opportunities for U.S. exporters also exist for oilseeds, protein meals and other feeds, as well as for wood products and grains.

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FOOD AND AGRICULTURAL PRODUCTS

TOTAL FRENCH IMPORTS OF

AND U.S. MARKET SHARE VALUE

CY 2000

High Value Products:	Total (USD millions)	From U.S	U.S. share (percent)
- Meat and Offals	2,592	19	0.7

- Dairy and Eggs	1,947	4	0.2
- Coffee, Tea & Spices	809	1	0.1
- Manufactured Tobacco	1,320	16	1.2
- Prepared Meat	231	n/a	n/a
- Fish, Seafood, Fresh or Frozen	2,328	98	4.2
- Prepared Fish and Seafood	594	6	1.0
- Processed Grains	186	1	0.5
- Sugar and Confectionery	523	n/a	n/a
- Cocoa and Chocolate	1,177	n/a	n/a
- Prepared Grain Products	1,394	5	0.4
- Fresh and Dry Vegetables	1,384	23	1.7
- Fresh and Dried Fruits	2,119	88	4.1
- Processed Fruits & Vegetables(1)	1,674	102	6.1
- Misc. Food Preparations	819	15	1.8
- Beverages (except spirits)	1,033	12	1.2
- Spirits	482	29	6.0
Sub Total High Value Products	20,612	419	2.0S
Sub Total Bulk Products (*)	6,732	303	4.5
TOTAL HIGH VALUE + BULK PRODUCTS	27,344	722	2.6

(*) Includes live animals & animal products, nursery products, grains, oilseeds and seeds for planting, vegetable extracts, fats and oils, protein meals and other feeds, wood, non-manufactured tobacco and raw products (i.e., cotton, silk, wool & other animal hair, raw hides and skins). (–) Means nil or insignificant. (1) Including fruit juices. Source: French Customs

Exchange Rate: USD 1.00 = FF 7.12 FF for year 2000

A. Tariffs and Import Taxes

The member states of the European Union have established a Community Integrated Tariff (TARIC) system, under which duties are applied to imports from non-EU countries. TARIC was established by the 1958 Treaty of Rome as part of the European Economic Community (EEC). The Single Market program has been reinforced by the Uruguay Round. It focuses on the consolidation of an integrated European market, rather than developing new policy directions. There are combined bilateral, regional, and multilateral policies.

The duties levied on imports from non-EU countries, including the United States, are moderate. Most raw materials enter duty-free or at low rates, while most manufactured goods are subject to rates between 5 and 17 percent. Most agricultural product imports are covered by the Common Agricultural Policy (CAP), under which many items are subject to variable levies designed to equalize the prices of imported commodities with those produced in the EU. Agricultural products are strictly regulated based on EU and French standards.

France and other EU member states have a network of preferential trade agreements that is expanding rapidly. The EU has customs union agreements (two-way free trade with common external tariffs) with Turkey, Cyprus, Andorra and Malta. There are free trade agreements (two-way free trade without common external tariffs) in place with (in Europe) Norway, Iceland, Switzerland and Liechtenstein; (in central Europe) Hungary, Poland, Czech Republic, Slovak Republic, Bulgaria, Romania, Estonia, Latvia, Lithuania and Slovenia; (in the Mediterranean) Israel, PLO, Tunisia, Morocco, and Jordan (and in negotiation with Egypt, Lebanon, Syria and Algeria). FTA's with Mexico and South Africa were concluded in 1999. The EU opens its borders without reciprocity (one-way EU trade preferences) for southeast Europe, the Mediterranean, the ACP (African, Caribbean and Pacific developing countries under the Lomé Convention), and other developing countries under the Generalized System of Preferences (GSP).

To export consumer-ready food products to France, an U.S. exporter should consider market access restrictions and food laws. Most processed products entering the European Union and France are subject to additional import charges based on the percentage of sugar, milk fat, milk protein and starch in the product. These additional import charges may make certain imported processed products non-competitive in the European market, vis-a-vis similar products produced in the EU. The situation should improve over the next few years because these charges will be converted to fixed tariff equivalents and reduced under the World Trade Organization. Interested U.S. exporters should contact the Office of Agricultural Affairs for up-to-date information on this issue.

The EU tariff schedule is based on the Customs Cooperation Council Nomenclature (CCCN) also referred to as the Harmonized System. This system was introduced to provide a standard tariff classification regime for all products imported and exported throughout the world. Agriculture has high import tariffs in order to maintain a strict regime of what type of produce and meat are accepted into the EU. Non-hormone treated produce and meat are less likely to face harsh import restrictions. Further tariff reductions are expected due to the Uruguay Round. The decrease average for industrial manufacturing goods is expected to be around 3% over the next few years.

B. Trade Barriers

U.S. companies sometimes complain of France's complex technical standards and unduly long testing procedures. Testing requirements (usually performed in France) and standards sometimes appear to exceed reasonable requirement levels needed to assure proper performance and safety. Most of the complaints have involved electronics, telecommunications equipment, and agriculture phyto-sanitary standards. There has been progress towards removal of non-tariff barriers in bilateral trade with the U.S. in the context of the transatlantic dialogue. There are bilateral trade agreements (including MRAs - mutual recognition agreements) that are slowly lowering certain standards and other trade barriers between U.S. and European companies.

The 1989 EU Broadcast Directive requiring a "majority proportion" of television programming to be of European origin was incorporated into French legislation on January 21, 1992. France specifies a percentage of European programming (60 percent) and French programming (40 percent). These broadcast quotas were approved by the EU Commission and became effective on July 1, 1992. They are less stringent than France's previous quota provisions, which required that 60 percent of all broadcasts be of EU origin and that 50 percent be originally produced in French. The 60

percent European/40 percent French quotas are applicable throughout the day, as well as during prime time slots. The prime time rules go beyond the requirements of the EU Broadcast Directive and limit the access of U.S. programs to the lucrative French prime time market. Nevertheless, the market share of U.S. films and television shows remains high. Similar quotas affect radio broadcasting.

Under legislation enacted in the early 1990s, the French government requires non-EU lawyers to qualify as "avocats," on the basis of full-fledged membership in the French bar. Legal consulting service providers in foreign and international law are required to be licensed in French law. Non-EU firms are not permitted to establish branch offices in France under their own names. Also, foreign lawyers and firms are not permitted to form partnerships with or hire French lawyers. The "legal consultant" category of lawyer no longer exists in France.

C. Customs Valuation

Import duties are calculated on an ad valorem basis, i.e. expressed as a percentage of the value of the imported goods. This dutiable value is the "transaction value" plus freight, insurance, commissions, and all other charges and expenses incidental to the sale and delivery of the goods to the point of entry into EU customs territory. The invoice price will normally be accepted as the transaction value if the seller and the buyer are not related.

Under Article VII of the General Agreement on Tariffs and Trade (GATT), there are four additional methods for the determination of customs valuation in the event that the method described above is rejected by customs authorities.

These methods are to be applied in the following order: (1) the transaction value of incidental goods; (2) the transaction value of similar goods; (3) the deduction method, i.e. the resale price, less such costs as customs duties, taxes and commissions; and (4) the computed value, utilizing costs of production, profit, and other expenses.

Most imports enter under Most Favored Nation's Rates. Textile, automobile, and consumer electronics continue to have relatively high duties, but there is rapidly decreasing regulation. Cereal, meat, dairy, sugar, and tobacco continue to have relatively high tariffs and restrictions. Many are EU-wide initiatives.

D. Internal Taxes

In addition to the duties levied under the Common External Tariff, goods imported into France are also subject to a value-added Tax (VAT). Currently, the VAT in France is generally charged at one of two rates:

- The standard rate of 19.6 percent
- The reduced rate of 5.5 percent, applicable mostly to agricultural products and foodstuffs, original artworks and certain medicines.

VAT must be added to the price of all goods and services sold in France in connection with an industrial or commercial activity. The supplier of any good or service bills his customer at his selling price, plus the amount of VAT at the applicable rate. The

supplier collects the full amount, subtracts his own VAT expenditures from the total amount of VAT collected, and periodically pays over the difference to the tax authorities.

E. Export Controls

France cooperates with her trading partners, including the U.S., to control the export of products and technologies with potentially defense applications. There are no other restrictions or regulations on the export of merchandise from France, with the exception of strategic products (including arms and dual-use technologies) and antiques. Before exporting these latter items, special licenses must be obtained from customs officials to insure that the objects being exported are not a part of the national heritage of France.

Information on U.S. export controls is available from:

Office of Export Administration
U.S. Department of Commerce
Washington, DC 22030
Tel: (202) 482-4811; For overseas companies: Tel. (202) 482-2547
Fax: (202) 482-3617; Email: bx@doc.gov

F. Import/Export Documentation

Import and export transactions exceeding FRF 250,000 in value must be conducted through an approved banking intermediary. Goods must be imported/exported no later than six months after all financial and customs arrangements have been completed.

For products originating in countries other than EU member states or participants in the World Trade Organization (WTO), and for a limited number of products considered to be sensitive, a specific import/export license may be required by product or by category of products. Otherwise, the following documents are required to import into France:

Shipping Documents. - - The documents generally required by France on all sea and air shipments from the United States include the commercial invoice, the bill of lading or air waybill, and a certificate of origin.

Commercial Invoice. - - As in a domestic transaction, the commercial invoice is a bill for the goods from the buyer to the seller. No special form of commercial invoice is prescribed; the firm's letterhead may be used. The invoice should contain the following details both in English and French:

- Names and addresses of seller and buyer.
- Place and date the invoice was prepared.
- Method of shipment.
- Number, kind and markings of the packages and their numerical order.
- Exact description of the goods-customary commercial description according to kind, quality, grade, etc., with special emphasis on factors increasing or decreasing their value.
- Quantity of goods, expressed in units customary in international trade.
- Agreed price of the goods (unit cost, total cost, including shipping and Insurance charges, as well as other expenses charged to the costs of the Goods).

- Delivery and payment terms.
- Although not a requirement, it is advisable to have the signature of a Responsible official of the exporting firm on each invoice.

Bill of Landing or Air Waybill. - - This is a contract between the owner of the goods and the carrier. Either a straight or negotiable bill of landing is acceptable. No consular formalities are required and shipments may be made freight collect.

Certificate of Origin. - - This document certifies that the goods entering French territory are made in the United States, and thus are subject to the duties, taxes and restrictions that apply to U.S. goods. Although certificates of origin are not expressly required for all imports into France, they are strongly recommended. If a shipment is not accompanied by a certificate of origin, it may be held up by customs. French authorities accept certificates of origin certified by local U.S. Chambers of Commerce.

Other Documents. - - Information on documents required for exportation to France of agricultural products (including food items), plants and animals is available from the Foreign Agricultural Service of the Department of Agriculture. Owing to the complexities of these regulations, U.S. exporters should also obtain information directly from the importer prior to shipment.

For information on duties, taxes, and documentation, contact one of the following two offices:

Office of European Community Affairs
U.S. Department of Commerce
14th & Constitution, Rm. 3314
Washington, D.C. 20230
Tel: (202) 482-5276
Fax: (202) 482-2897
Email: tic@ita.doc.gov

Centre de Renseignements des Douanes
84 Rue d'Hauteville
75010 Paris
France
Tel: (33) 1.53.24.68.24
Fax: (33) 1.53.24.68.30
Email: dgdddicrd01@calva.net

G. Temporary Entry

Samples and Carnets. Samples with no intended commercial value enter France free of duties and taxes. When sending such samples parcel post, the sender must specify what types of samples are being shipped. "No commercial value" should be written on the appropriate shipping documents.

In order for samples of commercial value to enter France duty- and tax-free, a bond or deposit of the total amount of duties and taxes must be arranged. Samples must be re-exported within one year if the deposit is to be recouped. An alternative to placing such a deposit is applying for an ATA Carnet.

ATA Carnet. An ATA carnet is a special international customs document designed to simplify and streamline customs entry procedures for merchandise into participation countries for up to one year. The initials "ATA" are an abbreviation of the French and English words "Admission Temporaire/Temporary Admission." Customs authorities in the United States and France accept carnets as a guarantee that all customs duties and excise taxes will be paid if any of the items covered by the carnet are not re-exported within the time period allowed. Carnets may be used for commercial samples, professional equipment, and goods destined for exhibitions and fairs.

To inquire about or apply for an ATA Carnet, contact the U.S. Council for International Business:

USCIB
1212 Avenue of the Americas
New York, NY 10036
Tel: (212) 354-4480
Fax: (212) 575-0327
Web Site: <http://www.uscib.org>

H. Labeling and Marking Requirements

Labeling must provide consumers with precise information that answers six basic questions about the product:

- What is it?
- What is it used for?
- What is it made of?
- What does it cost?
- How is it used?
- When should it be used?

As labeling is strictly controlled in France, the answers are found in many regulatory texts.

U.S. firms entering the French market are strongly advised to examine EU as well as French laws. Each European Union country is integrating the rulings of the EU into its national legislation. As much legislation regarding labeling is still in the developmental stage, EU labeling regulations and standards need to be carefully monitored.

For agricultural products, the Office of Agricultural Affairs has an up-to-date extensive listing of labeling and packaging regulations and requirements on a product by product basis.

Labeling in France serves an increasingly informational and even promotional role. Labels often act as "silent salespeople," especially due to the recent growth of large retail stores offering little sales assistance.

Basic Labeling Requirements. Though many labeling regulations are sector related, the following information is generally required for all categories of products:

Language: Labels must be written in French. Any foreign words or abbreviations must have been authorized by French or international law. The writing must be clear and non-promotional.

Designation: State what the product is. For example: "olive oil."

Brand Names/Trademarks: Any names, symbols and marks relating to the product must be found on the exterior of the packaging, the product label, and the bottle-top or lid, as the case applies. Registered brand names and trademarks can only be used by the manufacturer.

Composition: All ingredients or materials constituting the product must be listed.

Usage Instructions: Explain how the product is to be used.

Required Dates: These include when the product was made, the consumption limit for perishable items, and recommended "use by" date for pre-packaged and frozen food products.

Qualifiers: For example: "made by hand" on leather goods.

Name/Address of Manufacturer or Vendor

Specifications: Labels must inform the consumer of any particular product limitations or sales conditions.

Price: The price (including all taxes) must be marked on all pre-packaged goods, unless they are sold by mail order.

Bar Code Price Labeling (GENCOD): Stores are increasingly using this system to speed up the passage of clients at cash registers. GENCOD, France's bar code price labeling system, is generally used for products with a low per-unit value and rapid turnover, as well as for food and non-food products requiring an individual price marking because of their value, nature, or presentation.

Quality and Ecological Labels. More established quality seals and labels exist in France than in any other European country. Though desirable because they offer extra information to the customer, they are not mandatory.

Quality Labels: There are two types of French quality certificates:

- Certificates issued by professional associations; each must be contacted individually for more information. For a list of professional associations, contact the Mouvement des Entreprises de France (MEDEF):

MEDEF
31, avenue Pierre-1er-de-Serbie
75784 Paris Cedex 16
France
Tel: (33) 1.40.69.44.44
Fax: (33) 1.47.23.47.32

Web Site: <http://www.medef.fr>

- Certificates issued by AFNOR, which controls the coveted and highly regarded French "NF" Mark. This quality seal certifies that a product complies with all applicable French standards.

Environmental Labels: AFNOR also issues the "NF Environment" label, which certifies that a specific product meets the environmental criteria to qualify for a NF mark. This label is only available for a limited number of goods, as it is still in the early stages of development. Currently, an "NF Environment" label can be issued for paints, lubricants, trash bags, household chemicals, heating equipment, cosmetics, and insulating materials and papers.

The member states of the European Union are currently developing a European Ecolabel, which would certify products as environmentally friendly across the EU. AFNOR is the issuer of the Ecolabel for products manufactured in, first marketed in, or imported into France. An Ecolabel can already be issued for washing machines and dishwashers. There are further twenty-five products for which certification criteria are currently being drawn up by member states.

For information on the "NF" and the "NF Environment" marks, contact AFNOR directly. (See section J)

I. Prohibited Imports

While not traditionally considered to be a "closed market", certain regulations exist in both France and the EU which limit the market access for specific U.S. agricultural exports. Products which are subject to restrictive regulations include: hormone-fed beef, poultry meat, enriched flour, genetically engineered foods and crops; "exotic meats" such as alligator and buffalo, crayfish, and certain fruits and vegetables which are subject to seasonal price restrictions. Other fruits such as pineapples and bananas are subject to import certificates. Fresh vegetables such as artichokes, cucumbers, eggplants, tomatoes, lettuce, and squash are also subject to seasonal price restrictions. The ongoing harmonization of EU import regulations will hopefully result in the revocation of several of the French regulations that currently prohibit the importation of agricultural and food products.

J. Standards

U.S. exporters should note that all goods entering France should conform to French and European Union standards. This is mandatory for all products fulfilling publicly funded contracts, as well as for all machinery, tools, household appliances, sporting equipment, toys, etc. Conformity is generally optional for other goods fulfilling private contracts. Products that meet French and EU standards have increased marketability.

CE Marking: The E.U. Commission regulate certain product categories for health and safety by harmonizing the levels of protection in the E.U. member states. When a product meets the essential health and safety requirements as outlined in the so-called new approach directives, the manufacturer must affix the CE mark that guarantees "European Conformity. If the CE mark is not affixed, the product will not be authorized for import and sale in the E.U.

These standards often differ substantially from those in the U.S. In many cases, particularly with goods of a technologically complex or potentially harmful nature, rigorous testing and approval procedures must be undertaken before the goods in question can be sold in France. Although one of the goals of the European Union is to harmonize standards across the twelve EU member states, many of these EU standards remain in the developmental stage. Where an EU standard does not currently exist, French standards apply.

Testing requirements sometimes appear to exceed reasonable requirement levels needed to ensure proper performance and safety. Most of the complaints have involved electronics, telecommunications equipment, medical/veterinary equipment, and agricultural phyto-sanitary products.

Mutual Recognition Agreements: The EU is implementing a harmonized approach to testing and certification as well as providing for the mutual recognition within the EU of national laboratories designated by Member States to test and certify a substantial number of "regulated" products. The EU encourages mutual recognition agreements between private sector parties for the testing and certification of non-regulated products. One difficulty for U.S. exporters, is that only "notified bodies" located in Europe are empowered to grant final product approvals of regulated products. While there are some laboratories in the United States that can test regulated products under subcontract to a notified body, the limited number of such labs means that such subcontracting procedures are unlikely to provide sufficient access for U.S. exporters. Moreover, these labs cannot issue the final product approval but must send test reports to their European affiliate for final review and approval, which delays the process and adds costs for U.S. exporters. The United States and the EU have negotiated a Mutual Recognition Agreement (MRA) for several important sectors as a means of addressing this issue. MRAs will permit U.S. exporters to test and certify their products to the requirements of the EU in the United States, and vice versa. The U.S.-EU MRA entered into force on 1 December 1998. The MRA provides for a transition phase ranging from 18 months to 3 years, depending on the specific sector. Under the agreed Trans-Atlantic Economic Partnership (TEP), the United States and EU plan to negotiate MRAs in additional sectors. At the moment, the U.S./EU MRAs cover the following sectors:

- EMC (electromagnetic compatibility) - in force
- RTTE (radio and telecom terminal equipment) - in force
- Medical devices - in force at the end of 2001
- Pharmaceuticals - in force at the end of 2001
- Recreational craft - in force.

The Association Française de Normalisation (AFNOR) is the French authority in charge of coordinating the establishment of standards. AFNOR prepares new and revised standards, subjects them to public inquiry, and finally submits them to the relevant ministry for approval. Copies of the most up-to-date standards can be obtained directly from AFNOR:

AFNOR
11, Avenue Francis de Pressensé
93571 Saint Denis La Plaine Cedex
Tel. (33) 1 41 62 80 00
Fax (33) 1 49 17 90 00

Web Site: <http://www.afnor.fr>

Information on standards may also be requested from:

American National Standards Institute
11 West 42nd Street, 13th Floor
New York, NY 10036
Tel: (212) 642-4900
Fax: (212) 302-1286
Email: info@ansi.org

National Institute of Standards and Technology (NIST)
National Center for Standards and Certification Information
U.S. Department of Commerce
Building 820, Rm. 164
Gaithersburg, MD 20899
Tel: (301) 975-4040
Fax: (301) 926-1559
Web Site: <http://www.nist.gov>

EU Hotline (on draft standards of the CEN, CENELEC, and ETSI).
Tel: (301) 921-4164

Underwriters Laboratories, Inc. can assist U.S. exporters in understanding and complying with French and EU standards. UL is authorized by the French government to test and certify electrical equipment:

Underwriters Laboratories
International Compliance Services Department
1285 Walt Whitman Road
Melville, NY 11747
Tel: (516) 271-6200
Fax: (516) 271-8259
Web Site: <http://www.ul.com>

Standards and testing for medical devices:

Commission National d'Homologation (CNH)
1, place de Fontenoy
75350 Paris 07
France
Tel: (33) 1.40.56.47.56
Fax: (33) 1.40.56.50.89

Laboratoire National d'Essais
1, rue Gaston Boissier
75015 Paris
France
Tel: (33) 1.40.43.37.00
Fax: (33) 1.40.43.37.37
Web Site: <http://www.lne.fr>

Questions regarding standards and certification of machinery, heavy equipment, and plant facilities should be directed to U.S. the office of APAVE, the primary French technical inspection organization:

APAVE
American European Services, Inc.
Suite 120 1054 31st Street, NW
Washington, DC 20007

Standards - ISO 9000 Certification

The AFNOR (Association Française de Normalisation) coordinates work and research relating to standardization in France. AFNOR prepares new and revised standards, subjects them to public inquiry, and then submits them to the relevant ministry for approval. It is the French branch of the European Standardization System (CEN) and a member of the International Organization for Standardization (ISO).

Following EU harmonization policy, the official French standards or "Normes Françaises" (NF) are now in line with those of ISO 9000. In France, compliance with national standards is mandatory for only 5 percent of the cases. These are for the most part safety and health standards on the product itself. However, one must bear in mind that ISO 9000 certifies the company's management organization, not its products. Hence, the ISO 9000 certification will not necessarily fulfill these product-related requirements.

The recognition and use of ISO 9000 in France is expanding at a very fast pace. The ISO 9000 certification is never mandatory, but it increasingly plays a determining role, especially for sub-contracting companies. Contracts between firms now often include a request for quality assurance. In this respect, ISO 9000 is the most widespread and recognized quality management program in France.

ISO 9000 has become a great marketing tool in France, sometimes more cost-effective than advertising. However, its efficiency as a marketing device varies from sector to sector. ISO 9000 is meant to provide quality recognition from firm to firm, rather than from a firm to end-users. For sub-contractors in the public sector or in a heavily competitive field in the private sector, ISO 9000 generally provides added value. In fields such as those under EH directives (i.e. medical equipment) or subcontracting in the auto-industry, conformity to ISO 9000 is crucial to stay competitive.

The AFAQ (Association Française pour l'Assurance de la Qualité) is the French quality system registrar, which delivers ISO 9000 certifications. The AFAQ has issued approximately 1200 companies with ISO 9000 certifications and it is estimated that about 200 more companies in France have the certification. Requests are now booming, with 3500 being processed by the AFAQ. The certification takes about 6 months to complete. A foreign company with an ISO 9000 certification from abroad simply needs to contact the AFAQ in order to be certified in France.

The demand for ISO 9000 registration in France, as well as in Europe, comes primarily from the marketplace as a contractual rather than a regulatory requirement. As compliance with the ISO 9000 standards becomes recognized and required by foreign and domestic buyers and used by manufacturers as a competitive marketing tool, the

demand for ISO 9000 conformity will increase. It is therefore critical for manufacturers to determine what are their buyers' requirements regarding ISO 9000 compliance.

Useful Addresses:

AFNOR

11, Avenue Francis de Pressensé
93571 Saint Denis La Plaine Cedex
Tel. (33) 1 41 62 80 00
Fax (33) 1 49 17 90 00
Web Site: <http://www.afnor.fr>

AFAQ - Association Française pour l'Assurance de la Qualité
B.P. 40
92225 Bagneux Cedex
France
Tel: (33) 1.46.11.38.50; (33) 1.46.11.37.11
Fax: (33) 1.46.11.37.77
Email: Mary.francoise.goubaux@afaq.org

In the United States:

AFAQ, Inc.
Woodfield Executive Center
1101 Perimeter Drive, Suite 450
Schaumburg, IL 60173
Tel: (847) 755-9125
Fax: (847) 330-0707

AES - American European Services
1054 31st Street, NW Ste. 320
Washington, D.C. 20007
Tel: (202) 337-3214
Fax: (202) 337-3709
Email: ascert@aol.com

K. Membership in Free Trade Zone/Warehouse Agreements

As a member of the European Union, France is subject to all European Union Free Trade Arrangements. European Union laws and regulations provide that member states may designate parts of the customs territory of the Community as free trade zones and free warehouses. Information on free trade zones and free warehouses is contained in Title IV, Chapter Three, of Council Regulation (EEC) No. 2913/92 of October 12, 1992, establishing the Community Customs Code, titled, "Free Zones and Free Warehouses" (Articles 166 through 182).

Article 166 states that free zones and free warehouses are part of the customs territory of the Community or premises situated in that territory and separated from the rest of it in which:

- Community goods are considered, for the purposes of import duties and commercial policy import measures, as not being on Community customs territory, provided they are not released for free circulation or placed under another customs procedure or used or consumed under conditions other than those provided for in customs regulations;
- Community goods for which such provision is made under Community legislation governing specific fields qualify, by virtue of being placed in a free zone or free warehouse, for measures normally attaching to the export of goods.

Articles 167-182 details the customs control procedures, how goods are placed in or removed from free zones and free warehouses and their operation.

The use of free trade zones varies from member state to member state. In France, the process of applying for the status of a free trade zone or free warehouse is administered by the Ministry of Economy/Budget at the following address:

Ministry of Economy/Finance
 139, rue de Bercy
 75572 Paris Cedex 12
 France
 Tel: (33) 1.53.18.93.14
 Fax: (33) 1.53.18.96.03
 Web Site: <http://www.finances.gouv.fr>

A. French Investment Regime

- A1. Openness to Foreign Investment
- A2. Conversion and Transfer Policies
- A3. Expropriation and Compensation
- A4. Dispute Settlement
- A5. Performance Requirements and Incentives
- A6. Right to Private Ownership and Establishment
- A7. Protection of Property Rights
- A8. Transparency of the Regulatory System
- A9. Efficient Capital Markets and Portfolio Investment
- A10. Political Violence
- A11. Corruption

B. Bilateral Investment Agreements

C. OPIC and Other Investment Insurance Programs

D. Labor

E. Foreign Free Trade Zones/Ports

F. Foreign Investment Statistics

A. French Investment Regime

Ensuring that France's investment climate is attractive to foreign investors is a priority for French government officials, who see foreign investment as a way to create jobs and stimulate growth. Investment regulations are simple, and a range of financial incentives to foreign investors is available. The investment promotion agency, DATAR, provides active and extensive assistance to potential investors both in France and through offices around the world. Foreign investors say they are attracted to France by its skilled labor force, central location in Europe, and good infrastructure. However, despite a decade or more of economic reforms and liberalizations, U.S. and foreign companies often say they find relatively high payroll and income taxes, pervasive regulation of labor and products markets, and sometimes negative attitudes toward foreign investors to be disincentives to investing in France.

Foreign investment represents a significant percentage of production in many sectors. Foreign investment has been growing at a rate considerably higher than that of the economy as a whole. Using Bank of France balance of payments data based on the historical book value of investment, the United States is the largest foreign investor in France, with U.S. firms representing 17 percent of the stock of foreign investment. However, using the book value instead of the market value of investments tends to underestimate the value of U.S. investments in France. This is because investments by U.S. companies tends to be considerably older than other countries' investments and because U.S. firms often finance expansions and acquisitions on domestic French capital markets or through subsidiaries in third countries. Thus, much U.S. investment in France is not recorded in balance of payments statistics, even though it is ultimately controlled by U.S. citizens.

Correcting for these statistical biases, the market value of the stock of U.S. investment in France may be as much as double the \$40 billion book value for 1999 reported in U.S. Department of Commerce data (www.bea.doc.gov/bea/di1.htm). U.S. data also report that in 1998, 1,321 affiliates of U.S. firms employed over 501,000 people in France and had net sales of \$123million.

A1. Openness to Foreign Investment

The Formal Investment Regime

The formal French investment regime is among the world's least restrictive. There is no generalized screening of foreign investment. Only acquisitions, irrespective of size or the nationality of the investors, involving the health sector, public order or the national security of France are subject to a one month official review. Nevertheless, there are certain sector-based foreign investment restrictions that in practice tend to favor investors from other EU countries. France has notified the OECD of restrictions in the following sectors (more details can be found in OECD reports, including the April 1996 *Review of Foreign Direct Investment in France*. The OECD internet address is www.OECD.org/daf/investment/country-reviews.htm):

Agriculture	Aircraft Production
Air Transport	Atomic Energy
Audiovisual	Banking/Financial Services/Accounting Services
Defense Industry	Insurance
Maritime Transportation	Publishing

Radio and Television
Telecommunications

Road Transportation
Tourism

In applying sector restrictions, French authorities look to the place of residence, rather than to the nationality, of a potential investor. The place of residence of a corporate investor is determined by the place of residence of its ultimate beneficial owners, without regard to place of incorporation. While firms owned or controlled by American citizens legally resident in an EU country will normally be considered to be EU residents, France will normally consider the following entities with American ownership or participation to be non-EU residents:

- Firms established or incorporated in other EU countries, but owned or controlled by American residents.
- For publicly traded entities, firms where non-EU residents own more than 20 percent of a firm's capital.
- For non-publicly traded entities, firms where non-EU residents ultimately own or control more than 33.3 percent of a firm's capital, unless physical persons who are EU residents also own more than 50 percent of the firm's capital.

However, for publicly and non-publicly traded firms, the French government retains the authority to declare that a firm is controlled by non-EU investors, even if the share of capital held by non-EU investors falls short of the thresholds noted above. To determine if non-EU investors control a firm, the French government may look at, among other factors, the residency of members of the board of directors, and the ability of non-EU investors to veto key management decisions or commercial ties (such as loans, guarantees, options, licenses, or contracts) if these factors effectively make the French company dependent on foreign investors. Firms with questions about their residency status should contact the Office of Foreign Investments at the following addresses:

Service du Financement de l'Etat et de L'Economie
Bureau B1 Epargne et Marché Financier
Direction du Trésor
139, rue de Bercy
75012 Paris, France
Tel: (33)-1-4487-7121

Service des Financements et Participations
Direction du Trésor
139, rue de Bercy
75012 Paris, France
Tel: (33)-1-4487-7200 or 7205

The website of the Paris Chamber of Commerce and Industry provides detailed English summaries of regulations covering direct foreign investment:
www.CCIP.fr/uk/etudes/invdir.htm.

Informal Impediments to Foreign Investors

The January 1, 1999 introduction of the euro as the single currency of the European Monetary Union (EMU), including France, has increased the competitive pressures on France to improve its domestic business and investment climate in order to promote growth and create new jobs. In addition, France has responded to a more competitive international investment climate by implementing market-oriented economic reforms that increase the attractiveness of the French economy to foreign investors and by offering a variety of investment incentives. Foreign investors also say they are attracted to France by its central location in Europe, highly skilled labor force, and good infrastructure (although France continues to lag behind the U.S. and some other European countries in personal computer use and internet access).

Yet, while today's foreign investors face far less interference than was once the case, more than a decade of reforms has not entirely overcome a traditional preference for national control of business and a sometimes reflexive opposition to foreign investment. In some cases, this can be seen in labor organization opposition to acquisitions of French businesses by U.S. firms, often reflecting a perception that U.S. firms focus on short-term profits at the expense of employment. In other cases, French firms have stated a preference for working with French and European, rather than U.S. firms. A degree of opaqueness in the privatization process (see below) can also aggravate suspicions about the equal treatment of foreign investors in publicly-held firms.

In addition, deregulation is far from complete and the state remains very involved in economic life. There is extensive regulation of business and labor markets and business taxation rates are high compared to other leading industrial countries. Foreign investors most often cite unnecessary labor regulation and high income and payroll taxes as the greatest disincentive to investing in France. In the case of labor market regulation, the impact on companies of the transition to a 35-hour legal workweek (which went into effect in 2000 for firms with over 20 employees and which will apply to other firms by 2002) is so far unclear.

The French authorities are now treating two social security taxes, the "Contribution Sociale Generalisée" (CSG) and the "Contribution au Remboursement de la Dette Sociale" (CRDS), as social security contributions. US contributors to the US Social Security system will no longer have to pay these taxes. [Based on the "May 2 2001-377 ordonnance" to apply the 1408/71 EEC regulation only "individuals who are subject to income taxes in France and contribute to the French social security system including health insurance pay CSG and CRDS". The related "circulaire d'application" will be published in the "Bulletin Economique du Ministere de l'Emploi"].

An English summary of tax regulations applicable to foreign companies in France is available at the Paris Chamber of Commerce and Industries' website:
www.CCIP.fr/uk/etudes/fisapp.htm.

France's Privatization Program

The current government that took office in July 1997 restarted a process of privatization and opening of government controlled firms to private investment that had been essentially stalled since 1993. The current policy is that sales of government holdings will be allowed when in the national interest or the competitive interest of the specific firm. Since 1997, the government has returned to the private sector all or parts of its stakes in a number of other large companies, banks and insurance groups. The

privatization of Crédit Lyonnais, a major retail bank was concluded in 1999. U.S. firms have shown an interest in some of these sales. However, the Government still has large stakes in Air France (57.0%), France Telecom (54.0%), Renault (44.2%), Thomson Multimedia (37.0%) and Thales (formerly Thomson CSF - 33.3%). The Government has also stakes in Bull, EADS and Dassault Systemes.

Sales of government interests are conducted either through market-based public offerings or, more often, through an off-market bidding process. In both cases, key decisions are made by the Ministry of Economy, Finance and Industry on the advice of the quasi-independent "Commission des Participations et des Transferts" (formerly known as the Privatization Commission). Both of these consider financial and business plans submitted by bidders. While there is a strict legal and procedural process regulating these decisions, the confidential nature of off-market sales can raise suspicions about the equal treatment of foreign versus French bidders. This can in itself have a chilling effect on foreign investment. In the past, a policy of selling former holdings to "core" shareholders in an effort to avoid the splitting-up of companies or sales of sensitive state assets to foreign investors also hampered market efficiency and tended to favor French firms.

When privatizing state-owned firms either through off-market placements or market-based offerings, the 1993 privatization law gives the French government the option to maintain a so-called "golden share" to "protect national interests." This provision is not specifically targeted at foreign companies, and has not been a part of every case of privatization. A golden share gives the government three legal rights:

- To require prior authorization from the Ministry Economy and Finance for any investor or group of investors acting in concert to own more than a certain percentage of a firm's capital. The thresholds would apply to all investors;
- To name up to two non-voting member's of the firm's board of directors; and
- To block the sale of any asset to protect "national interests." Assets could include not only shares, but buildings, technology, patents, trademarks, and any other tangible or intangible property.

French Government Participation in R&D Programs

With a 2.17% percent of GDP devoted to R&D, France is ranked 4th among OECD countries. The French government sponsors R&D and technology development programs at three different levels:

1. International/European programs (e.g. ESA, CERN, EUREKA);
2. technology development programs in the private sector (47.2 percent of R&D expenditures are funded by French government), with specific programs to encourage transfer of research and to aid small and medium firms; and
3. national research programs, with specific emphasis given to space, physical science, aeronautics, telecommunications, electronics, nuclear, and engineering research.

The main orientations of France's global (public and private) R&D budget are reflected in the budget allocations: industrial innovation (50.5 percent); basic research and

training (15.5 percent); military research (14.8 percent); technological “grands programmes” in aerospace, electronics, telecommunications, and nuclear (8,2 percent); support to public research agencies (7.2 percent); support to industrial innovation (2.3 percent). The French contribution to EU programs (1.3 percent) also constitutes a research incentive with an important driving force.

Research priority areas are:

- life sciences (post-genomic research; medical imagery; telemedicine; development of a national network for biotech incubators; prion research);
- information and communication sciences and technologies;
- science and environment (water and environment; earth observation and space applications; accidental marine pollution);
- human and social disciplines;
- space.

For access to R&D subsidies, the French government gives national treatment to all foreign companies registered in France, allowing them to receive the same treatment as French companies. U.S. companies have experienced no difficulty in participating in these opportunities.

Visa, Work Requirements

The government of France requires that foreign citizens follow an extensive procedure if they wish to work in France. The requirements are essentially the same whether foreign citizens work for French or foreign-controlled firms. Non-EU nationals who intend to work or conduct any commercial activity in France must receive a long-term visa and a work permit (carte de travail) or business permit (carte de commerçant) before establishing residence in France. Information can be obtained from French embassies and consulates. The web address of the French embassy in Washington is www.info-france-usa.org/fembassy.htm. The internet address of the U.S. embassy in Paris is www.amb-usa.fr.

In addition, a foreigner's ability to practice a profession may be curtailed by government regulation and the regulations of French professional associations. For example, lawyers seeking to practice in France must become members of the French bar before they can practice any type of law under their own names. This requires passing the bar examination in French.

A2. Conversion and Transfer Policies

All inward and outward payments must be made through approved banking intermediaries by bank transfers. There is no restriction on repatriation of capital. Similarly, there are no restrictions on transfers of profits, interest, royalties, or service fees. Foreign-controlled French businesses are required to have a resident French bank account and are subject to the same regulations as other French legal entities. The use of foreign bank accounts by residents is permitted.

France has few effective foreign exchange control regulations. For exchange control purposes, the French government considers foreigners as residents from the time they

arrive in France. French and foreign citizens are subject to the same rules. Residents are entitled to open an account in foreign currency with a bank established in France and to establish accounts abroad. Residents must report the account number for all foreign accounts on their annual income tax returns. French-source earnings may be transferred abroad.

A3. Expropriation and Compensation

Under French law, private investors are entitled to compensation if their properties are expropriated, and such compensation must be adequate and paid promptly. In France's bilateral investment treaties, the French government promises to provide both prompt and adequate compensation. There have been no recent disputes involving expropriation of U.S. investments.

A4. Dispute Settlement

There have been few major disputes involving established U.S. firms in recent years. Government decisions in investment cases can be appealed to administrative tribunals and ultimately to the Council of State (Conseil d'Etat). The rights of U.S. investors are also protected by the U.S.-French bilateral convention (see Section B below).

The judicial system is independent. Property and contractual rights are enforced by the French civil code. Judgments of foreign courts are accepted and enforced by courts in France once they have been "declared executory" by a French judge through "exequatur" proceedings (Art. 2123 of the French Civil Code and Art. 509 of the Civil Procedure Code). However, in some civil cases and in bankruptcy cases, foreign judgments are recognized and enforced by French courts without executory proceedings.

France is a member of the World Bank's International Center for the Settlement of Investment Disputes (ICSID -- www.WORLDBANK.org/ICSID). In addition, in most of its bilateral investment treaties (BIT's) it has agreed to accept binding arbitration to resolve investor-state disputes. However, most of France's BIT partners are developing countries whose investors have few investments in France. (See below).

A5. Performance Requirements and Incentives

Investment Incentives

France offers a range of financial incentives to foreign investors. Its planning and investment promotion agency, DATAR (Delegation à l'Aménagement du Territoire et à l'Action Régionale), provides extensive assistance to potential investors. In addition, financial subsidies and tax incentives are offered at the local, regional and national government level to attract investment to France's less affluent areas. Incentives are available equally to French and foreign investors and eligibility requirements are the same.

Within the French government, foreign investment promotion is the responsibility of the "Invest in France Mission" headed by an ambassador at-large, who is based at the Ministry of the Economy, and backed-up by DATAR. DATAR maintains offices throughout France and around the world to seek out and advise potential investors on

project development, site selection, investment incentives (the largest of which are administered by DATAR) and administrative and legal requirements. There are five DATAR "Invest in France" offices in the United States:

Eastern States

DATAR-IFA New York
810 Seventh Avenue, Suite 3800
New York, NY 10019
Tel: (212) 757-9340
Fax: (212) 245-1568

Western States

DATAR-IFA Los Angeles
1801 Avenue of the Stars, Suite 1248
Los Angeles, CA 90067
Tel: (310) 785-9735
Fax: (310) 785-9213

Midwestern States

DATAR-IFA Chicago
401 North Michigan Ave., Suite 565
Chicago, IL 60611
Tel: (312) 661-1640
Fax: (312) 661-0623

Southern States

DATAR-IFA Houston
2411 Fountainview Drive, Suite 130
Houston, TX 77057
Tel: (713) 266-9772
Fax: (713) 266-9884

Invest in France Offices:

SAN FRANCISCO
88 Kearny Street, Suite 1510
San Francisco,
CA 94108
Tel: 415/989-1558
Fax: 415/989-3257

Besides DATAR, several French cities and regions have developed their own investment promotion agencies that advise potential investors, offer administrative assistance, and oversee investment incentives. All incentives are covered by regulations set by the European Commission. The DATAR and Invest in France internet addresses are www.InvestinFranceNA.org (in English) and www.DATAR.gouv.fr.

The primary investment incentive offered through DATAR is the Prime d'Amenagement du Territoire (PAT). DATAR has revised downward the PAT program at the European Commission's request. Nonetheless the PAT incentives remain generous for investment

in disadvantaged zones (part of the North and the Center, and Corsica). Interestingly the new PAT system is more supportive of small- and medium sized companies in the services sector. (New rules were issued in the April 13, 2001 "Journal Officiel"). Other investment incentives may also be available. Potential investors should consult DATAR and Invest in France to determine the full range of possibilities, including,

- Research and development project grants
- Special tax treatment for company headquarters
- Local and regional tax holidays and special subsidies
- "Industrial conversion" zones featuring tax breaks and grants for job-creation
- Special access to credit for small and medium-sized enterprises
- Assistance for training, including a portion of wages paid to employees in training

Performance Requirements

Other than those linked to incentives, there are no mandatory performance requirements established by law. However, the French government will generally require commitments regarding employment or research and development from both foreign and domestic investors seeking government financial incentives. For example, to be eligible for DATAR grants, the French government usually requires that firms, whether owned by EU or non-EU residents, create a minimum of 20 jobs within the first three years. As noted above, PAT and R&D subsidies are based on the number of jobs created. In addition, the authorities have occasionally sought commitments as part of the approval process for acquisitions by foreign investors.

Nonetheless, foreign firms need the French government's approval on a variety of regulatory issues, and in France, officials generally have much wider discretion than their U.S. counterparts. This can leave firms subject to "unwritten" performance requirements, with regulatory officials making it known that a firm's request would be more favorably viewed if it increased employment, R&D, or exports.

A6. Right to Private Ownership and Establishment

The French government maintains legal monopolies in the following sectors: postal services (La Poste), national rail transportation (SNCF), Parisian bus and metro services (RATP), and tobacco manufacturing and distribution (Seita). The supply and production of gas (GDF) is still a monopoly. The electricity and gas company (EDF/GDF) has no longer monopoly of production, distribution and sale of electricity and gas. The French government deregulated 30 percent of the electricity market and 20 percent of the gas market in 2000.

The French government also remains a major shareholder in enterprises that compete with private firms. French and foreign private sector firms sometimes complain that government-owned enterprises receive favorable treatment in getting licenses, credit, and procurement contracts from the government. In addition, the French government

has come to the financial rescue of state-owned firms experiencing difficulties. Private sector firms argue that these arrangements unfairly reduce state-owned firms' financing costs. While these issues have an impact on the quality of investment returns and the competitiveness of firms, the right to private ownership and establishment is firmly protected under French law. Foreign investors and French firms under foreign control are subject to the same law, regulation, and treatment as French nationals.

A7. Protection of Property Rights

France is a strong defender of intellectual property rights and has highly developed protections for intellectual property. Under the French system, industrial property is protected by patents and trademarks, while literary/artistic property is protected by copyrights. By virtue of the Paris Convention and the Washington Treaty regarding industrial property, U.S. Nationals have a "priority period" after filing an application for a U.S. patent or trademark, in which to file a corresponding application in France. This period is twelve months for patents and six months for trademarks.

A8. Transparency of the Regulatory System

The French government has made considerable progress in recent years improving the transparency and accessibility of its regulatory system. Government Ministers, companies, consumer organizations and trade associations may petition the Unfair Competition Council to investigate anti-competitive practices.

Of most concern to foreign companies has been standards setting. With standards different from those in the U.S., rigorous testing and approval procedures must sometimes be undertaken before goods can be sold in France, particularly those that entail risk. When EU-wide standards do not exist, specific French standards apply. Mutual recognition agreements covering the testing and certification of certain specified regulated products have been negotiated by the United States and the EU. Information about these agreements and efforts to extend them can be found at the website of the Trans-Atlantic Business Dialogue, www.TABD.com. The National Institute of Standards and Technology, www.NIST.gov, is represented at the International Bureau of Weights and Measures, www.BIPM.fr, located in Sevres, France, and may be of assistance to firms.

Industry associations have an influential role in developing both government policies and influencing self-regulatory organizations. U.S. firms may find it useful to become members of local industry groups. Experience has shown that even "observer" status can offer U.S. firms an insight into new investment opportunities and greater access to government-sponsored projects, even if U.S. firms sometimes feel they are not always given an adequate opportunity to participate in the determination of regulations.

A9. Efficient Capital Markets and Portfolio Investment

Access to Capital and Capital Markets

France has an open financial market that gives firms easy access to a variety of financial products in both French and international markets. As markets expand, foreign and domestic portfolio investment have become increasingly important forms of investment. France continues to make progress in modernizing its marketplace,

although progress in introducing tax-advantaged retirement funds, authorized by a 1996 law, has been blocked since July 1997. Facing the prospect of increasingly tough competition with other European marketplaces following the introduction of the euro, French financial markets are continually modernizing and adapting their products, procedures and services. In May 1999 the French stock market has also signed a draft treaty with seven European counterparts (London, Frankfurt, Milan, Madrid, Amsterdam Zurich and Brussels) in an effort to create a pan-European stock market. The pan-European stock market is still in the creation process. France is actively involved in the international effort to create a system of internationally accepted accounting standards (to read more, go to www.IASC.org.uk or search the SEC's website at www.SEC.gov). French market and banking regulators continue to enhance and develop cooperation with their foreign counterparts. French legal, regulatory and accounting systems may not be as transparent as U.S. systems, but are consistent with international norms.

Commercial banks offer all classical financing instruments, including short, medium, and long-term loans, short-and medium-term credit facilities, and secured and non-secured overdrafts. Commercial banks also assist in public offerings of shares and corporate debt, and mergers, acquisitions and takeovers. Banks offer hedging services against interest rate and currency fluctuations. France also had 169 foreign banks with total assets of FF1 trillion at the end of 1999, some with sizable branch networks. Foreign companies have access to all banking services. Although some subsidies are available for home mortgages and small business financing, most loans are provided at market rates.

Increasingly, firms in France are bypassing banks and going directly to financial markets for their financing needs. The center of the French market is the Euronext stock exchange, created when the Paris exchange merged with the Dutch and Belgian bourses in 2000 (local exchanges were closed in 1990), which listed 1,653 companies with a total capitalization of euro2.4 trillion (1.7% of French GDP) in 2000. In 1996, a new electronic trading floor called the "Nouveau Marché" was created in which new companies, especially smaller ones with an emphasis on growth and technology, can raise start-up capital. A financial futures market, the "Marché à Terme des Instruments Financiers," commonly known as the MATIF, trades standard contracts on interest rates, short- and long-term bonds, stock market, indices and commodities. It has established linkages with its German and Swiss counterparts and well as with the Chicago Mercantile Exchange. An options exchange, the "Marché des Options Négociables de Paris (MONEP)," was established in September 1987. These markets operate under the auspices of the ParisBourse SBF, whose website address is (www.bourse-de-paris.fr). Finally, though not nearly as developed as in the United States or the United Kingdom, venture capital has become an increasingly important way for start-up firms to raise funds.

According to Bank of France estimates, foreigners held approximately 37.5% of the capital of publicly traded French companies at the end of 2000. For a foreign company incorporated in an OECD country to be listed on the Euronext stock exchange, it must be sponsored by a French bank or broker and prepare a French language prospectus to get a permit from the "Commissions des Operations de Bourse (COB)" (the French equivalent to the SEC). The Council of State might authorize foreign companies incorporated in an OECD country to provide statements in English and a short summary in French. A final decision could be made in July. Based on current regulations an application to the COB must include French translations of three years of financial

statements and an auditor's report on these statements. The sponsoring bank or broker is responsible for placing the securities with investors when the securities are listed and for acting as a market-maker. Special procedures apply to listing on the "Nouveau Marché." Companies must offer at least 100,000 shares with a value of at least FF10 million, or be able to demonstrate comparable liquidity in their home market if already listed on another exchange. Information is available at the Nouveau Marché's website, www.nouveau-marche.fr/gb/default.htm.

Cross-Shareholding

An intricate network of cross-shareholdings among French corporations has often been seen as a barrier to foreign acquisition of French firms. Often, two French companies will each own a significant share of the other. This system, which was traditionally a means to help ensure state-control of the economy, has weakened in recent years under the pressure of the marketplace.

Mergers and Acquisitions

In the 1990s, takeovers have become increasingly frequent, particularly those aimed at integrating complementary operations or product lines or at expanding market share. While French laws regarding takeovers do not discriminate against foreign investors, a hostile takeover in France by a foreign investor could face public and even official scrutiny. Provisions of the company takeover law are designed to limit hostile takeovers of publicly traded companies. For example, stockholders are required to reveal themselves to company management and the authorities when their holdings total 5, 10, 20, 33 or 50 percent of the capital of the company. On crossing the 10 percent threshold, purchasers must declare their "intentions" for the period covering the coming twelve months. When a potential investor makes a "public offer to purchase" (OPA) shares in a publicly traded company, that offer must remain open for at least 20 working days for "friendly" bids and 35 working days for "unfriendly" bids. Both of these last two provisions were tightened in early 1997. In 2000, a draft law under consideration by parliament would require notification to labor unions of takeover attempts. Newcomers to the French stock market should also be aware of the possibility that by-laws of individual companies may impose requirements that purchasers of significant amounts of stock in a company report that purchase to the management of the company.

A10. Political Violence

Occasionally, anti-American sentiments, particularly among groups likely to be economically harmed by U.S. policies, produce demonstrations against U.S. investments. For example, in 1999, French farmers, protesting U.S. trade actions that affected exports of certain French agricultural products, dismantled much of a McDonalds restaurant under construction in the south of France. The recent massive demonstrations by anti-globalization protesters at major international conferences and summits around the world, which have resulted in the targeting of U.S. firms and significant property damage, could be replicated in France should there be an attractive opportunity for such groups. However, incidents of this type are mostly isolated, and there is little risk of nascent insurrection, belligerent neighbors, or widespread civil disturbances.

A11. Corruption

France has laws, regulations and penalties that effectively combat acts of corruption committed in France. A 1993 law established a Central Service for the Prevention of Corruption under the aegis of the Ministry of Justice. The French judiciary is responsible for prosecution, and is active in doing so. There have been numerous investigations and convictions of public officials and businessmen under the anti-corruption statutes. Penalties for acts of corruption vary according to the circumstances; they often include fines and prison terms.

France ratified the OECD Anti-Bribery Convention and enacted implementing legislation to enforce its provisions in 2000. More information about the agreement can be found at the OECD's Internet address, www.OECD.org.

There have been no specific complaints from U.S. firms of unfair competition or investment obstacles due to corrupt practices in France in recent years. More information on the international fight against corruption can be found at the internet site of Transparency International, www.Transparency.de, a private organization.

B. Bilateral Investment Agreements

1959 U.S.-France Convention on Establishment

U.S. investment in France is subject to the provisions of the Convention on Establishment between the United States of America and France, which was signed in 1959 and is still in force. Some of the rights it provides to U.S. nationals and companies include:

- the right to be treated like domestic nationals in all types of commercial activities including the right to establish offices and acquire majority control of French firms. (This right does not apply to firms involved in communications, air transportation, water transportation, banking, the exploitation of natural resources, certain "professions," and the production of electricity) and in obtaining and maintaining patent and trademarks;
- the right to receive the best treatment accorded to either domestic nationals and companies or third country nationals and companies with respect to transferring funds between France and the U.S.; and
- the requirement that property may only be expropriated for a public purpose and that payment must be just, realizable, and prompt.

The treaty does not apply to the use or production of fissionable materials, arms, or any materials used directly or indirectly to supply military establishments. The treaty does not prevent application of measures necessary to protect essential security interests.

Bilateral Investment Treaties

Investments in France by other EU member states are governed by the provisions of the Treaty of Rome and by Union Law. France has also signed Bilateral Investment Treaties (BITs) with the following 61 countries: Albania, Argentina, Armenia, Bangladesh, Bolivia, Bulgaria, Chile, China, Congo (DROC), Croatia, Czech Republic, Ecuador, Egypt, El Salvador, Equatorial Guinea, Estonia, Haiti, Hong Kong, Hungary, Indonesia,

Israel, Jamaica, Jordan, Korea (South), Kuwait, Kyrgyzstan, Laos, Latvia, Liberia, Lithuania, Malaysia, Malta, Mauritius, Mongolia, Morocco, Nepal, Nigeria, Oman, Pakistan, Panama, Paraguay, Peru, Philippines, Poland, Romania, Russia, Singapore, Slovakia, South Africa, Sri Lanka, Sudan, Syria, Trinidad and Tobago, Turkmenistan, Ukraine, United Arab Emirates, Uruguay, Uzbekistan, Vietnam, Yemen, and Yugoslavia (Federal Republic).

Bilateral Investment Treaties signed with the following countries have not yet been ratified: Algeria, Azerbaijan, Brazil, Byelorussia, Costa Rica, Cuba, the Dominican Republic, Georgia, Guatemala, Honduras, India, Kazakhstan, Lebanon, Macedonia, Mexico, Moldova, Morocco, Namibia, Nicaragua, Qatar, Slovenia, and Tunisia.

French BITs generally cover the following:

- just and equitable treatment that is no less favorable than that accorded to domestic investors or the most favored investor from a third country;
- restrictions on expropriation of investments, and requirements that, in the case of expropriation, compensation be prompt and adequate;
- free transfers; and
- the ability to resolve investor-state disputes through binding international arbitration.

C. OPIC and Other Investment Insurance Programs

Given France's high per capita income, investments in France do not qualify for investment insurance or guarantees offered by the Overseas Private Investment Corporation (OPIC). You can connect with OPIC at www.OPIC.gov.

D. Labor

France's private sector labor force is one of the country's strongest points in attracting foreign investment, combining high quality with competitive unit wage costs.

The labor code sets minimum standards for working conditions including the work week, layoffs, overtime, vacation and personal leave. Other labor standards are contained in collective agreements, which are usually negotiated by sector on a national or regional basis by the various unions and employers' associations. French absenteeism is modest by European standards and, in the private sector, peaceful labor relations prevail.

While the rate of unionization in France has steadily declined to about half that of the United States, French labor law provides an extensive institutional role for employee representatives and for organized labor.

- In companies with more than 10 employees, employee delegates are elected for a one-year term. They are authorized to present individual or collective claims and grievances relating to working conditions, to inform government labor inspectors of any

complaints under the labor law, and to concur with management in any reorganization of the work week. Management is required to meet with employee delegates at least monthly.

- A company with more than 50 employees must have a joint management/employee enterprise committee, to which employee representatives are elected. The committee must be consulted for all major corporate decisions, but has no veto. The enterprise committee must be provided with the same information that is made available to shareholders. It is funded by the company at a rate equal to at least 0.2 percent of the firm's payroll, and uses this money to finance social and cultural activities for the benefit of employees.
- Workers also hold most slots on occupational health and safety committees, which are mandatory in medium and large size companies. Labor tribunals (playing a role largely equivalent to the NLRB in resolving labor disputes) are comprised of equal numbers of union and employer representatives. Appeals are possible to the level of the "Cour de Cassation", one of France's high courts.

Due to a variety of macro and microeconomic factors, including high payroll taxes, a high minimum wage, and rigid labor laws, French businesses tend to use less labor intensive procedures and rely more on labor saving technology than businesses in other countries. This is one reason for France's high unemployment rate.

Following news of the Marks and Spencer (a British retailer) and Danone (processed food) layoffs Communists, Greens, and left wing Socialists have pointed to the layoffs and the "precarious" nature of many recently created jobs. These political groups proposed amendments to the law ("Loi de modernisation sociale"), asking for a more precise definition of economic layoffs that limits employer room for maneuver and for a greater role of the worker's council in the process of economic layoffs. Amendments were included in the law passed June 13, 2001.

E. Foreign Free Trade Zones/Ports

France is subject to all European Union free trade zone regulations and arrangements. These allow member countries to designate portions of their customs territory as free trade zones and free warehouses. France has taken advantage of these regulations in several specific instances. The French Customs Service administers these zones and can provide more details: Customs can be contacted at the finance ministry web address: www.finances.gouv.fr.

In addition, the French government has established urban "enterprise zones" (Zones Franches Urbaines) in 38 depressed or impoverished municipalities in France or its overseas territories. There are also two special investment zones (Zones d'Investissement Privilégié) located in the Nord-Pas-de-Calais region in which firms can benefit from certain tax credits.

More information on enterprise and investment zones is available from DATAR and Invest In France: InvestinFranceNA.org and www.DATAR.gouv.fr.

TABLE 7: MAJOR FOREIGN INVESTORS

Today, foreign-controlled firms play a significant role in France's economy: they account for 22 percent of the workforce, 27 percent of capital expenditures, 30 percent of exports, and 30 percent of production.

Major foreign investors by industry included in approximate order by size:

AGRIBUSINESS

Eridania Beghin-Say (Montedison - ITL)
Nestle France (Nestle - CH)
Unilever France (Unilever - NL)
Cargill France (Cargill - USA)
Kraft Foods France (Phillip Morris - USA)
Coca-Cola Enterprise (Coca-Cola - USA)
Brasseries Kronenbourg (Scottish Newcastle - GB)
Friskies France (Nestle - NL)
Brasseries Heineken (Heineken - NL)
Ferrero-France (Ferrero International - L)
Coca-Cola Midi (Coca-Cola - USA)
CPC France (Bestfoods - USA)
Mars Alimentaire (Mars - USA)
Kellogg's Produits Alimentaire (Kellogg - USA)
Wrigley (Wrigley - USA)
Ducros (Ms Cormick - USA)
Bacardi-Martini (Gal Beverage - NL)
Interbrew France (Interbrew - B)
Lindt et Sprungli (Lindt - CH)
United Biscuits France (UB Investments - NL)
Schweppes-France (Cadbury Schweppes - GB)
Cereal Partners (Nestle/General Mills - CH/USA)
G.H. Mumm et Cie (Hicks Muse Tate & Furst - Canada)
Vamo Excel (Vandemootele -B)
Martell et Cie (Seagram -Canada)
Brasserie Fischer (Heineken - NL)
Lorenz Bahlsen Snacks France (Bahlsen - D)
Conserves France (Groupe Conserve Italia - ITL)
Brossard France (Sara-Lee - USA)
General Traiteur (Groupe Unigate - GB)
Gelmer - Iceland Seafoods (SIF - IS)
Doneurope (Mars - USA)
Dailycer (Wessanen - NL)
Courvoisier (Allied Domecq - GB)
Sobeval (Navobi - NL)
Lamy-Lutti (Continental Sweets - NL)
Haribo Riqles Zan (Haribo - GER)
Lavazza France (Lavazza - I)
Vals (Vals - NL)
(stop at number 239)

TRANSPORT EQUIPMENT

ANF Industry (Bombardier - Canada)
Liebherr Aerospace Toulouse (Liebherr International - CH)
Ratier-Figeac (UT Holdings: Group UTC - USA)
BF Goodrich Aerospace Europe (BF Goodrich - USA)
Sab Wabco (Sab Wabco - S)
Secan (Honeywell (ex-Allied Signal) - USA)

AUTOBOBILES

Groupe Fiat en France (Fiat - ITL)
Groupe Volkswagen France (Volkswagen - GER)
Groupe Ford France (Ford Motor- USA)
Daimler Chrysler France (Daimler Chrysler - GER)
Fiat Auto France (Fiat - ITL)
Opel France (General Motors - USA)
Delphi Automotive Systems France (Delphi Automotive Systems Corp. - USA)
Iveco France (Iveco NV - NL)
Lucas France (Lucas Investments - GB)
Robert Bosch France (Bosch - GER)
Continental en France (Continental - GER)
Toyota France (Toyota - Japan)
TRW en France (TRW - USA)
Honda Motor Europe (south) (Honda Motor - Japan)
Rover France (Rover Group - GB)
Volvo Trucks France (Volvo - S)
Nissan France (Nissan Europe NL)
Bridgestone Firestone Europe (Bridgestone Firestone Europe - B)
Scania France (Volkswagen - GER)
Behr-France (Behr - GER)
Dunlop France (Sumitomo Rubber Industries - Japan)
Goodyear France (Goodyear Dunlop Tires Europe - NL)
Yamaha Motor-France (Yamaha Motor Europe - NL)
Suzuki France (Suzuki - Japan)
Peguform France (Venture - USA)
GKN Glaenzer Spicer GKN Automotive - GER)
Johnson Controls Roth (Johnson Controls - USA)
Solvay Automotive France (Solvay - B)
Freudenburg (Freudenburg & Co - GER)
Rieter Automotive France (Rieter - CH)
Allevard Rejna Autosuspensions (Sogefi - ITL)
Behr Lorraine (Behr - GER)
Standard Products Industriel (The Standard Products Company - USA)
Wabco France (American Standard - USA)
Nacam France (ZFLS - GER)
Knorr-Bremes (Knorr - GER)
(stop at 93)

ENERGY

ESSO SAF (Exxon - USA)

BP France (BP Europe - GB)
Societe des Petroles Shell (Royal Dutch Shell - NL/GB)
ELYO (Suez Lyonnaise des Eaux - B)
Mobile Oil Francaise (Mobile - USA)
Primagaz SA (SHV - NL)
Agip Francaise (Agip Petroli - ITL)
Zeller et Cie (Conoco/DEA-RWE - GER)

CHEMICAL

Bayer en France (Bayer - GER)
Solvay en France (Solvay - B)
Kodak (Eastman Kodak - USA)
Francaise Exxon Chemical (Exxon Corp - USA)
Bayer SA (Bayer AG - GER)
Du Pont De Nemours (France) (Du Pont De Nemours NV - NL)
3M France (3M -USA)
Henkel France (Henkel - GER)
BASF France (BASF - GER)
Dow France (Dow Chemical - USA)
AGFA-Gevaert (AGFA-Gevaert - B)
Ciba Specialites Chimiques (Ciba - CH)
Lyondell Chimie France (Lyondell - USA)
Polimeri Europa France (Polimeri Europa - ITL)
Lubrizol France (Lubrizol - USA)
SKW Biosystems (Degussa - GER)
Clariant France (Clariant - CH)
Monetell France (Montell - NL)
Tioxide Europe (Huntsman Ici - USA)
BASF Coatings (BASF Coatings - GER)
Hoechst Schering Agrevo (Hoechst Schering Agrevo - GER)
Enichem France (Enichem - ITL)
Naphtachimie (Atofina - FR/GB)
Saria Industries (Saria Bioindustries - GER)
Cognis France (Cogins - NL)
Clariant Huningue (Clariant - CH)
Sipcam Phyteurop (Finidustria - ITL)
Sicpa (Sicpa - CH)
National Starch Chemical (ICI - USA)
Langlois (Klockner Chemiehandel - GER)
Elf Atochem AGR (Elf Atochem North America - USA)
Morton (Morton International - USA)
(stop at 92)

PHARMACEUTICALS/COSMETICS

Novartis Groupe F. (Novartis - CH)
Procter and Gambel France (Procter Gambel - USA)
Laboratoire Glaxo Wellcome (Glaxo Wellcome - GB)
Hoechst Marion Roussel (Hoechst - GER)
Lipha (Merck - GER)

Laboratoires MSD-Chibret (Merck and Co - USA)
Colgate-Palmolive (Colgate Palmolive -USA)
Lilly France (Eli Lilly - USA)
Smithkline Beecham (Smithkline Beechman - GB)
Produits Roche (Roche - CH)
Warner Lambert en France (Warner Lambert - USA)
Lever (Unilever - NL)
Pfizer (Pfizer - USA)
Janssen Cilag (Johnson and Johnson - USA)
Laboratoires Hoechst Houde (Hoechst - GER)
Bourjois (Pamerco - CH)
Aventis Pharma Usiphar Compiègne (Aventis - GER)
Beiersdorf (Beiersdorf - GER)
Schering-Plough (Schering - CH)
Laboratoires Roussel (Hoechst - GER)
Boehringer Ingelheim France (Boehringer - GER)
Ethicon (Johnson and Johnson - USA)
Solvay Pharma (Solvay - B)
Abbott France (Abbott Labo - USA)
Laboratoires 3 M Sante (3M - USA)
Schering (Schering - GER)
Laboratoires Cassenne (Hoechst Marion Roussel - GER)

ELECTRONICS

Philips France (Philips - NL)
Siemens France (Siemens - GER)
Sony France (Sony - Japan)
EL.FI. SA (EL.FI SA - ITL)
Nokia France (Nokia - SF)
Nortel Matra Cellular (Nortel - Canada)
Leroy-Somer (Emerson Electric - USA)
ABB en France (ABB - CH)
Motorola (Motorola - USA)
Canon France (Canon - USA)
Whirlpool France (Whirlpool Europe - USA)
Cabels Pirelli (Pirelli - ITL)
Tyco Electronics France (Tyco - USA)
Samsung Electronics France (Samsung - CRS)
Solelectron France (Solelectron Corp - USA)
Merloni Electromenager (Merloni - ITL)
Mitsubishi Electric Europe (Mitsubishi El. - Japan)
Schlumberger Industries (Schlumberger - AND)
Hage (Hager - GER)
Ascom Monetel (Ascom - CH)
Oldham France (BTR - GB)
Vishay SA (Vishay Europe - GER)
Thomas Marconi Sonar (TMS - NL)

INFORMATION TECHNOLOGY/OFFICE SUPPLIES

Hewlett-Packard France (Hewlett-Packard - USA)
Compagnie IBM France (IBM - USA)
Compaq Computer (Compaq Computer - USA)
Dell Computer (Dell - USA)
Toshiba Systemes France (Toshiba - Japan)
Lexmark International (Lexmark - USA)
EDS (EDS - USA)
Epson France (Epson Europe - NL)
Ricoh France (Ricoh - Japan)
Oracle France (Oracle NL - NL)
Unisys France (Unisys - USA)
SAP France (SAP - GER)
Microsoft France (Microsoft - USA)
Canon Bretagne (Canon - Japan)
Ricoh Industries France (Ricoh - Japan)
Amadeus Development Company (Amadeus Global Travel Distribution - E)
Soleri (Debis - GER)
Computer Associates (Comput Assoc. - USA)
Silicon Graphics (Silicon Graphics - USA)
Brother France (Brother - GB)
Logica (Logica - GB)
SIAB (Bull/Wang Global - F/USA)
Origin France (Philips - NL)

MACHINARY AND EQUIPMENT

Case France (Tenneco - USA)
De Dietrich & CIE (ABN Amro - NL)
John Deere France (John Deere - USA)
GE Energy Products France (General Electric - USA)
Caterpillar France (Caterpillar - USA)
Agco (Varity - USA)
La Continentale D'enterprises (Harwanne - CH)
Liebherr France (Liebherr - GER)
Baxter (Baxter Int - USA)
INA Roulements (INA Waelzlager Schaeffler - GER)
Fenwick-Linde (Linde - GER)
Staubli Faverges (Staubli - CH)
Becton Dickinson-France (Becton Dickinson - USA)
Trane (American Standard - USA)
Atlas Copco France (Atlas Copco AB - S)
KSB (KSB - GER)
Carrier (Uniter Technologies - USA)
Heidelberg Websystems (Heidelberger Druckmaschinen - GER)
Still & Saxby (Linde - GER)
Schindler (Roux Combaluzier Schindler - CH)
Kuhn (Bucher Holding - CH)
Sew-Usocome (Sew Eurodrive - GER)
Dresser-Rand (Dresser Rand - USA)
B Braun Medical (Braun AG - GER)

METALS INDUSTRY

Engelhard-clal (Fimalac/englhard - F/USA)
Trefimetaux (KM Europa Metal - GER)
Union Minere France (Union Minere SA - B)
Ispat Unimetal (Ispat International - NL)
Lamies Marchands Europeens (Beltrame - ITL)
GTS Industries (Dilinger Huttenwerke - GER)
Alsacienne D'Aluminum (VAW Aluminum - GER)
Comilog (Comilog - G)
Ferco International (Gretsch Unitas - GER)
Beautor (Cockerill Sambre - B)
Bodycote Hit (Bodycote - GB)
Sofreb (Crown Cork and Steel - USA)
Spit (ITW - USA)
Oxford Automotive France Industries (Oxford Automotive - USA)
Oxford Automotive France Douai (Oxford Automotive - USA)
Valfond Alliage Legers (USB - CH)
Howmet (Cordant Technologies - USA)
Le Creuset (Le Creuzet - GB)
Valmex (Textron - USA)
Reynols Aluminum France (Reynols Metals Company - USA)
Krupp Presta France (Krupp Gerlach - GER)
Gestamp Noury (Gestamp Automocion - E)
TI Group Automotive Systems (TI Group - GB)
Griset (Diehl Stiftung - GER)

TEXTILES/CLOTHING

DIM (Sara Lee - USA)
Paul Hartmann (Hartmann - GER)
Triumph INT (Triumph Universal - CH)
NA-Pali (Quicksilver - USA)
Hexcel Fabrics (Hexcel – USA)
Playtex France (Sara Lee – USA)
Samsonite (Samsonite – B)
Confection De Soultz (Big Star Textilien – GER)
Lee Cooper France (Vivat – GB)
Nordlys (Polymer Group – USA)
Mossley –Badin (Mosley – GB)
Frogs (Rip Curl – AUS)
Martel Catala (Albany International Holding – Selestst – USA)
Desseilles Textiles (Courtaulds Textiles PLC – GB)
CS Interglas (CS Interglas AG – GER)
Seton Scholl Fr (Seton Scholl – USA)
Bonar Floors (Low & Bonar – GB)
Standard Wool France (Standard Wool – USA)
A. Lafront (Kansas Wenaas – USA)
Polo Europe (Polo International – B)
Hunter Douglas Fabrications France (Hunter Douglas – NL)
Sefar Fyltis (Sefar Holding – CH)

PAPER PRODUCTS

SCA Hygiene Products (SCA France Alphabet BV – NL)
Steelcase Strafor (Steelcase – USA)
Arjo Wiggins (Arjo Wiggins Appleton – GB)
Smurfit Socar (Smurfit Intl – IRL)
International Paper (Intl Paper – USA)
Kimberly Clark (Kimberly Clark – USA)
Stora Enso Corbehem (Stora Feldmuelhe – SF)
Smurfit Condat (Jefferson Smurfit Group PLC – IRL)
Cascades (Paperboard – Canada)
Kayersberg Packaging (David S Smith – GB)
Norske Skog Golbey (Norske Skog – NL)
Smurfit Cellulose Du Pin (Jefferson Smurfit – IRL)
Raflatac (UPM Kymmene – SF)
Chapelle Darblay (UPM Kymmene – SF)
Melitta France (Melitta – GER)
Stracel (UPM Kymettne – SF)
Modo Paper Alizay SA (Modo Paper – S)
Smurfit Comptoir du Pin (Jefferson Smurfit – IRL)
Papeteries Canson et Montgolfier (Arjo Wiggins Appelston – GB)
Mead Emballage (Mead Foreign Holdings – USA)
Krono France (Krono Holding – CH)
Ahlstrom Dalle (Ahlstrom – SF)
Esselte (Esselte – S)
Danisco Flexible France (Danisco – DK)
LTR Industries (Schweitzer Mauduit – USA)
Sofecome / UPS Logistics (UPS – USA)
Mondi Packaging (France) (Mondi Packaging Europe – L)

PLASTICS

Valois (Aptar Group – USA)
Sealed Air (Sealed Air – USA)
Recticel (Recticel – B)
Toraiy Plastics Europe (Toraiy Industries – J)
Wavin (Wavin BV – NL)
Tupperware France (Tupperware – USA)
Viskase (Viskase – USA)
UDD-FIM (Von Roll Isola – CH)
Rexam Sofab (Rexam – GB)
Autobar Packaging F (Autobar – NL)
Thermoplastiques Cousin-Tessier (Tessier – B)
Isocab France (Isocab – B)
Formica (Formica Int – USA)
Elastograin-France (Elastograin – GER)
Isobox Technologies (Synbra – NL)
Astra Plastique (Crown Cork & Seal – USA)
Menzolit (Dynamit Nobel – GER)
Trespaphan F (Hoechst Trepaphan – GER)

Wipak Gryspeerdt (Wihuri Oy – SF)
Gidi Production (Groupe Otto – GER)
Reichhold (Reichhold Chemicals – USA)
Scott Badar (Scott Bader – GB)
Plastival (Group Tessenderlo – B)
Mea Industries (MEA – GER)

LEISURE, JEWELERY, AND PAPER

Waterman (Gillette – USA)
Sanford Reynolds (Newell Rubbermaid – USA)
Jeux Ravensburger (Ravensburger AG – GER)
Majorette Toys (Triumph Adler – GER)
Éclair Prym France (Bonduel Industries – B)

BUSINESS SERVICES

Manpower France (Manpower – USA)
Iss Abilis France (Iss – DK)
France Quick (Quick Restaurants – B)
Eurest France (Compass Group – GB)
Frankin (Iveco – ITL)
Avis Fleet Services (General Electric – USA)
Mc Donalds France (Mc Donalds – USA)
Avis Location de Voitures (Avis Group Europe – GB)
Sogeres (Abela – GB)
Algeco (Vtg/preussag – GER)
Randstad Interim (Randstand France – NL)
Brinks France (Brinks – USA)
CSC Peat Marwick (CSC Computer Services – USA)
Computacenter France (Computacenter – GB)
Polysius (Krupp-polsius – GER)
SCS Holding France (SGS – CH)
CMC (Cellcom – GB)
Kelly Services Interim (Kelly – USA)

COMMUNICATIONS

Prisma Presse (Gruner + Jahr – GER)
EMAP France (Emap – GB)
Dauphin (Clear Channel – USA)
Universal Music (Seagram – Canada)
Editions Atlas (Di Agostini – NL)
Les Echos (Pearson – GB)
Selection Du Readers Digest (Readers Digest – USA)
EMI France – EMI Group – GB)
Buena Vista Home Entertainment France (Walt Disney – USA)
Editions Lamy (Wolters Kluwer – NL)
Group Liaisons (Wolters Kluwer – NL)
Warner Home Video France (Time Warner – USA)
Eurodirect Marketing (Eurodirect Marketing – Monaco)

SGED (Bertelsmann/Havas – GER/F)

DISTRIBUTION

Castorama Dubois Investissements (Kingfisher – GB)
OCP (Gehe – GER)
Alliance Sante France (Alliance Sante – L)
Metro Cash and Carry France (Metro – GER)
Pum Station Service Acier (Cockerill Sambre – B)
Safic-Alcan (MG Trade Service – GER)
Xerox (Xerox – GB)
Brossette BTI (Woseley PLC – GB)
Darty et Fils (Kingfisher – GB)
KDI (Klockner & Co – GER)
Phoenix Pharma (Pheonix Pharmahandel – GER)
Quelle La Source (Quelle – GER)
Groupe Gillette France (The Gillette Company – USA)
Tradgrain (Farmland INC – USA)
Panasonic France (Matsushita – Japan)
Brenntag – (Stinnes – GER)
Toys R Us (Toys R Us – USA)
Compagnie Commerciale Andre (Andre & Cie – CH)
Marks and Spencers France (Marks and Spencers – GB)
Compagnie Europeenne de Cereales (AC Toepfer – NL)
Mitsui & Co France (Mitsui – Japan)

TRANSPORTATION

Havas Voyages (American Express – USA)
Danzas (Danzas – CH)
Hays Logistique France (Hays – GB)
Christian Salvensen (Christian Salvensen – GB)
Marmara (Ten Tour – Trk)
Frigoscandia (Prologis – USA)
Vacances Air Transat France (Vancas Air Transet Canada – Canada)
Axial (TBHI – GB)
Brostrom Tankers (Bronstrom Van Ommeren – NL)
TNT Logistics France (TNT Post Group – NL)
JCT International (Creative Tours – NL)

BUILDINGS

Enterprise Razel Freres (Bilfinger + Berger – GER)
Muller Travaux Publics (Besix – B)
Clever-Crawford (Cardo Door – S)
Enterprise de Travaux Internationaux (Saudi Oger – SAU)

BANKS

Credit Commercial de France (HSBC – GB)
Banque Sudameris (Comit – L)

Sumitomo Bank (Sumitomo Bank - Japan)
ABN Amro France (Amro Bank NV – NL)
Morgan Stanley (Morgan Stanley – USA)
Caisse Centrale de Rescompte (Commerzbank – GER)
JP Morgan & CIE (Morgan Trust – USA)
Banco Commerciale Italiana France (BCI – ITL)
Morgan Gauranty Trust (JP Morgan – USA)
Westdeustche Landesbank Bank (Westlb – GER)
Factofrance Heller (Groupe Heller – USA)
Barclays Capital France (Barclays Bank – GB)
Banque D'Orsay (Westdeutsche Landesbank – GER)
Republic Bank (Safra Republic – L)
Caixabank France (La Caixa – E)
The Bank of Tokeyo Mitsubishi (Mitsubishi – Japan)
Abbey National France (Abbey National – GB)
Monte Paschi Banque (MPS – ITL)
UBS (Monaco) (UBS – CH)
BCEN – Eurobank (Banque Central de Russie – RUS)
Union Industrielle de Credit (General Electric – USA)
Banque OBC (ABN Amro – NL)
Banca Intesa (France) (Banca Intesa – ITL)

INSURANCE

AGF (Allianz – GER)
Generali France Holding (Generali – ITL)
CGU France (CGU – GB)
Groupe Societe Suisse (France) (Rentenstalt – Swiss Life – CH)
Continent Assurances Iard (Toro – ITL)
La France Vie (General France Holding – ITL)
Norwich Union France (Norwich Union – GB)
Europ Assistance France (General France holding – ITL)
Winterthur France (Winterthur – CH)

Source: L'Usine Nouvelle – October 2000, Paris France

A. Banking System

The French banking system underwent a fundamental structural reform in 1984, which removed many of the distinctions between commercial banks and merchant banks and grouped most financial institutions under a single supervisory system. The largest French commercial banks, such as Societe Generale, Credit Lyonnais, BNP Paribas, Credit Agricole, Groupe CIC, and HSBC Credit Commercial de France, rank among the largest banks in the world. These commercial banks offer all classic financing instruments, including short, medium, and long-term loans, short-and medium-term credit facilities, and secured and non-secured overdrafts. Commercial banks also assist in public offerings of shares and corporate debt, as well as mergers, acquisitions and takeovers. Banks also offer hedging services against interest rate and currency fluctuations. France provides 169 foreign banks; some have sizeable branch networks.

The Bank of France ("Banque de France") is a member of the European System of Central Banks (ECSB) and the Banque de France's governor sits on the executive board of the European Central Bank. The Banque de France will continue to issue franc-denominated banknotes until the introduction of euro-denominated notes in 2002.

The Banque de France participates in the regulation and supervision of the French banking and financial system. Its governor is the chair of the Committee on Credit Institutions, which grants or withdraws banking licenses. The governor is also president of the Banking Commission, which ensures that banks adhere to banking regulations.

The French government has sold its majority equity stakes in major banks and insurance companies. However, it retains ownership of the Caisse des Depots et Consignations and minority stakes in several major financial institutions, including Credit Lyonnais. The French postal service, La Poste, an independent public entity, offers a range of financial service products and holds 10% of the French market.

B. Foreign Exchange Controls

All inward and outward payments must be made through approved banking intermediaries by bank transfers.

Repatriation of Capital and Earnings:

There is no restriction on repatriation of capital provided this is carried out through an approved bank and the investment in question was authorized. Similarly, there is no restriction on transfers of profits, interest, royalties, or service fees, provided the investment was authorized and made through approved banks.

Businesses:

Foreign-controlled French businesses are required to have a resident French bank account and are subject to the same regulations as other French legal entities. The use of foreign bank accounts by residents is permitted.

Individuals:

France has few controls on the use of foreign exchange. For exchange control purposes, foreigners are considered to be residents from the time they arrive in France. French and foreign citizens are subject to the same rules. Residents are entitled to open an account in foreign currency with a bank established in France and to establish accounts abroad. Residents must report the account number for all foreign accounts on their annual income tax returns. French-source earnings may be transferred abroad, without limitations if carried out through an approved bank.

C. General Financing Availability

Foreign companies have access to all banking services described in Section A. The other main financing is through French financial markets. The center of the French stock market is the Paris stock exchange (the "Bourse"). More details can be found in the Investment Climate Section of this report.

D. Export Financing

France has a sophisticated export financing market. In general, large commercial banks provide the bulk of export financing. These loans can be made to the French supplier or the foreign buyer. Most major U.S. commercial banks and the U.S. export-import Bank provide both financing and technical assistance for the exports of American companies to France.

Eximbank's web site "www.exim.gov" provides information on its export credit insurance, pre-export financing through working capital guaranteed loans, and medium and long-term loans and guarantees to overseas buyers.

COFACE: The Compagnie Francaise d'Assurance pour le Commerce Extérieur (COFACE), insures exporters on commercial terms against short-term non-payment risks, principally involving trade with other OECD countries. These include the insolvency of private buyers, unfavorable currency fluctuations on ordinary business, and political risks in OECD countries. In these cases, COFACE acts like any other insurer: it set a competitive premium based on perceived risks.

COFACE' s second function is to support French exporters in markets that conventional insurance companies are not willing to cover due to the perceived risks. These involve large projects, such as aircraft financing, as well as high-risk markets. In these cases, COFACE acts on behalf of and with the backing of the French Government. This category includes market survey insurance, medium-term credit insurance on large-scale projects and capital goods, investment risks in foreign countries, and exchange rate guarantees on major contracts or large amounts. In this case, COFACE acts as a representative of the French government.

COFACE also provides "expert credit insurance" for French agricultural exports into "high risk" markets. This coverage are usually in direct competition with U.S. agricultural exports.

E. Correspondent U.S. Banking Arrangement

All large French banks have correspondent U.S. banking arrangements. Many French banks also have subsidiaries or branch offices in the United States:

Natexis Banques Populaires (Houston, Los Angeles, New York)

BNP Paribas (Chicago, Dallas, Houston, Los Angeles, Miami, New York, San Fransisco) and susidiaries: French American Banking Corporation and the Bank of the West (California, Hawaii, Oregon, Washington, Idaho, Nevada, Guam and Saipan)

Banque Sudameris (Miami)

Union Européenne de CIC (New York)

CIC-Banque Transatlantique (Washington)

Credit Agricole (Menlo Park, San Francisco)

Credit Agricole Indosuez (Boston, Chicago, Houston, Jersey City, New York)

Credit Commercial de France (New York)

Credit Lyonnais (New York)

Societe Generale (Atlanta, Chicago, Dallas, Houston, Jupiter, Kansas City, Los Angeles, Nashville, New York, Orlando, Philadelphia, San Fransisco, Winterpark)

Below is a list of major American Banks present in Paris:

American Express International Banking Corporation

11 Rue Scribe

75009 Paris

Tel: (33) 1 47 14 50 00

Fax: (33) 1 47 14 51 99

Mr. Piero GRANDI, Président Directeur Général

Bank of America

43-47 avenue de la Grande Armée

75782 Paris Cedex 16

Tel: (33) 1 45 02 68 00

Fax: (33) 1 45 01 77 89

Mr. Jean-Claude MARECHAL, Président Directeur Général

Bank of New York

13-15, boulevard de la Madeleine

75001 Paris

Tel: (33) 1 42 97 90 20

Fax: (33) 1 42 97 43 73

Madame DEIDRE PEYROUX, Representative

Chase Manhattan Bank SA

42 rue Washington

75408 Paris Cedex 08

Tel: (33) 1 53 77 10 00

Fax: (33) 1 53 77 10 50

Président Directeur Général (pending)

Citibank

Citicenter, 19 Le Parvis

92073 Paris La-Défense Cedex 36

-Citibank International PLC (retail banking)

Tel: (33) 1 49 06 10 10

Fax: (33) 1 49 06 15 16

Mr. Jean-Claude GRUFFAT, Président Directeur Général

JP Morgan Company

14, Place vendôme

75001 Paris

Tel: (33) 1 40 15 45 00

Fax: (33) 1 40 15 44 77

Mr. Philippe LAGAYETTE, Président Directeur Général

Republic National Bank of New York
20, Place Vendôme
75001 Paris
Tel: (33) 1 44 86 18 61
Fax: (33) 1 40 20 94 85
Mr. Marc MACOMBE, Président Directeur Général

BUSINESS TRAVEL

Although French executives are becoming increasingly international in their outlook, Americans will occasionally encounter differences in business practices and cultural standards. Attention to the following points may improve the chances of a successful business trip to France.

A. Business Etiquette

The most important characteristic of French business behavior is its emphasis on courtesy and a certain formality. Appointment schedules and hierarchical titles are to be respected and correspondence--whether by mail or by fax--should be acknowledged promptly. A hand-shake is customary upon initiating and closing a business meeting, accompanied by an appropriate greeting. Professional attire is expected.

Today, many French executives put less emphasis on long, heavy business lunches for reasons of health and time. Nevertheless, informal business discussions in restaurants where everyone appreciates a good meal are one of the best ways to promote good working relations.

The working days abutting the French holidays and vacation periods are not "prime time" for business meetings; this could include the month of August and the several vacation periods between Christmas and Easter. Business hours in France are generally 9:00 AM to 6:00 PM (banking hours 9:00-4:30) Monday through Friday while stores are generally open 10:00 AM to 7:00 PM, Monday through Saturday. To ensure availability, advance appointments are recommended.

B. Entry of persons and things

Every U.S. citizen entering France must present a valid American passport; for stays of less than 3 months there is no requirement for visas, entry permits or health certificates.

Bona fide personal effects in a visitor's luggage (or hand-carried) are not normally subject to customs duties nor the 19.6 percent value-added tax. Items to be declared, however, include those intended to be left in France, goods for professional/commercial use as well as any prohibited items. Goods imported for exhibition may enter under bond, deposit or an ATA carnet.

Professional equipment may be temporarily imported into France free of duty and tax under the Customs Convention on Temporary Importation of Professional Equipment; the appropriate carnet may be obtained from the U.S. Council of the International Chamber of Commerce.

C. Electrical Characteristics/Communications

Electric current in France is 220 volts AC, 50 cycles. A transformer is needed for most U.S. electrical equipment and appliances.

Telecommunications to and from Paris compare favorably with those in any large U.S. city. A direct-dial telephone system links France to the U.S. and most of the world. Calls to the States may be charged to international telephone cards such as AT&T, MCI and Sprint; international directory inquiries may be reached by dialing 0-800-99-00-11 (AT&T Direct U.S. operator). Most public phones in France are equipped for the convenient "Telecartes" (pre-paid cards) available in tobacco shops, post offices and subway/railway stations at 100 francs for 100 units and 50 francs for 50 units.

D. Transportation

Frequent direct air service is available to many U.S. and French cities. The two airports serving Paris--Charles De Gaulle (Roissy) and Orly--are easily accessible by excellent bus (Air France) and rail service. The French railway system is among the best in the world; its efficient network ties in conveniently with public transportation in most French cities.

Buses and the Metro (subway) may be crowded during rush hours but they provide fast and efficient service, however, a word to the wise: as in many large cities world-wide, one should be alert to the dangers of pick-pockets while in public places.

E. Climate and Clothing

France's climate is temperate which varies somewhat from north to south. Rain is frequent and most experienced travelers carry collapsible umbrellas. Average temperatures in Paris range from 25 degrees Celsius (77 degrees F) in mid-summer to 6 Celsius (43 degrees F) in winter. Collar, tie and a dark business suit for men are very useful, especially in Paris. For women, similar attire is appropriate, but it should be noted that women in France do not dress as conservatively as in the U.S.

F. Bed and Board in Paris

May 2001 estimates of the Department of State for reasonable lodging and meal/incidental expenses for a business traveler are respectively \$149 and \$85 per day. One could pay less or a great deal more than this \$234 amount.

In France the ground floor in buildings is identified as "RC" (Rez-de-Chaussee) and the next floor up is considered the first floor.

Tipping in France is largely optional since a 15 percent service charge is normally included in restaurant bills. Small, additional tips are often left for particularly good service. Parisian taxi drivers may be tipped by rounding up the payment to include up to 10 percent of the fare. At no time in France are tips obligatory.

G. Commercial Language

While French is the official language in France, many business people speak English. Product literature, correspondence and negotiations in the French language provide a distinct advantage over competitors who use only English. It should be noted that other EU suppliers are accustomed to dealing in the French language.

H. Useful Addresses

Foreign Agricultural Service (FAS)

U.S. Embassy

2, avenue Gabriel

75382 Paris Cedex 08

TEL: (33) 1.43.12.22.45

FAX: (33) 1.43.12.26.62

Web Site: <http://www.amb-usa.fr>

E-mail: agparis@fas.usda.gov

The Commercial Service (CS)

U.S. Embassy

2, avenue Gabriel

75382 Paris Cedex 08

TEL: (33) 1.43.12.22.22

FAX: (33) 1.43.12.21.72

Web Site: <http://csfrance.amb-usa.fr>

E-mail: Paris.Office.Box@mail.doc.gov

American Hospital in Paris

63, boulevard Victor Hugo

92202 Neuilly sur Seine

Telephone: (33) 1.46.41.25.25

(24-hour English-speaking medical and dental emergency service; credit cards accepted.)

Emergency Medical Team and Ambulance (SAMU)

Telephone: 15 or (33) 1.45.67.50.50

Police Department

Telephone: 17

Fire Department

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I. French Holidays

January 1, 2002

April 1, 2002

May 1, 2002

May 8, 2002

May 9, 2002

New Year's Day

Easter Monday

Labor Day

Veterans' Day (WWII)/Ascension Day

Ascension Day

May 20, 2002
July 14, 2002
August 15, 2002
November 1, 2002
November 11, 2002
December 25, 2002

Whit Monday
French National Day
Assumption Day
All Saints' Day
Veterans' Day (WWI)
Christmas

Chapter 10

Economic and Trade Statistics

Appendix A – Country Data

1. PROFILE

POPULATION: 58 million

RELIGION: 90% Roman Catholics, 5% Muslim, 2% Protestants,
1% Jewish, 2% unaffiliated

GOVERNMENT: Republic
Head of State: Jacques Chirac
Head of Gov't: Lionel Jospin

LANGUAGE: French

WORKWEEK: 35 hours

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APPENDIX B - DOMESTIC ECONOMY
(USD millions, except as noted)

	<u>1999</u>	<u>2000</u>	<u>2001</u> (for)	
GDP (current USD, billions)	1,406.0	1,298.0	1,282.0	
GDP real growth rate (percent)	3.0	3.3	2.3	
GDP per capita (USD)	23,985.0	22,055.0	21,682.0	
Government spending as a percentage of GDP	53.5	52.8	52.1	
Inflation - CPI (percent)	0.5	1.7	1.8	
Unemployment rate (percent)		11.2	9.6	8.6
Foreign Exchange Reserves (Current USD billions)	71.0	67.0	n/a	
Average Exchange Rate (Francs per USD)	6.2	7.1	7.5	

(1) Private consumption deflator in 2001

Note: forecasts and assumptions for 2001 are based on June Government forecasts

APPENDIX C - MERCHANDISE TRADE
(USD billions, except as noted)

	<u>1998</u>	<u>1999</u>	<u>2000</u>
Total Exports (F.O.B.) excl. military equipment	306.0	306.0	301.0
Total Imports (C.I.F.) excl. military equipment	291.0	298.0	311.0
Exports to US (F.O.B.) excl. military equipment	22.0	23.0	26.0

Imports from US (C.I.F.) excl. military equipment	25.0	26.0	27.0
U.S. share of imports (percent) excl. military equipment	8.6	8.6	8.7
Trade balance with the US	-2.8	-2.7	-0.9
Average real growth rate of imports from world (percent)	8.2	8.5	12.7
Average real growth rate of imports of manufactured products from the US (percent)	11.8	12.5	14.5
Trade balances with three leading partners (CIF/FOB)			
-Germany	-1.4	-3.1	-4.9
-Italy	-1.3	-0.9	-0.3
-United Kingdom	6.3	6.4	4.7

Source: Official French Government data

Average Exchange Rate (Francs per USD Rate)	FF 5.9	FF 6.2	FF 7.1
--	--------	--------	--------

MAJOR AMERICAN EXPORTS TO

FRANCE – 2000

Rank / HS	Description	Exports (in
1/	84 Machinery	6,560
2/	85 Electrical machinery	2,746
3/	90 Optic, medical & scientific instrumentation	2,169
4/	88 Aircrafts & associated equip.; spacecraft vehicles & Parts	1,822
5/	29 Organic chemicals	1,164
6/	98 Special other	654
7/	30 Pharmaceutical products	525
8/	87 Vehicles, not railway	466
9/	39 Plastic	415
10/	38 Miscellaneous chemical products	395
11/	97 Art and antiques	310
12/	37 Photographic / motion picture equip.	301
13/	27 Mineral fuel, oil etc	203
14/	71 Precious stones and metals	171
15/	47 Wood pulp, etc.	144
16/	40 Rubber	137
17/	73 Iron / steel products	129
18/	33 Perfumery, cosmetic, etc	127
19/	48 Paper, paperboard	103
20/	75 Nickel and articles thereof	95

MAJOR AMERICAN IMPORTS

FROM FRANCE - 2000

Rank / HS	Description	Imports(in USD millions)
1/	84 Machinery	5,442
2/	88 Aircraft, spacecraft	5,240
3/	97 Art and antiques	2,311
4/	85 Electrical machinery	2,261
5/	22 Beverages	1,695
6/	98 Special other	1,300
7/	29 Organic chemicals	1,267
8/	87 Vehicles, not railway	1,074
9/	90 Optic, nt 8544, medical & scientific instruments	981
10/	33 Perfumery, cosmetics	831
11/	30 Pharmaceutical products	820
12/	27 Mineral fuel, oil etc	594

13/	72 Iron and steel	515
14/	99 OSPECL IMPR provisions	402
15/	39 Plastics	376
16/	70 Glass and glassware	320
17/	28 Inorganic chemicals	316
18/	38 Misc. chemical products	269
19/	40 Rubber	266
20/	73 Iron / steel products	258

* HS refers to the Harmonized System by which goods are classified for the purpose of international trade

Source: World Trade Atlas

APPENDIX D FOREIGN INVESTMENT STATISTICS

TABLE1 - Inward FDI
Stock by country of Origin (1) (US\$ billions)

	1997	1998	1999 (prel.)
OECD	136	160	195
EU, of which	120	106	135
Netherlands	26	29	39
United Kingdom	22	23	26
Germany	14	21	24
Belgium	15	13	18
Italy	7	7	9
Other	35	12	18
North America, of which	.	.	.
USA	25	31	35
Canada			
Other OECD countries, of which			
Switzerland	13	16	19
Japan	3	3	3
Other			
Non-OECD countries, misc.	4	5	6
Total	140	165	201
as a percent of GDP			

Average Exchange Rate:USD1.00 FF 5.8 FF 5.9 FF6.2

(1) Book value

The Bank of France will publish complete 1999 data in August 2001

Table 2 - Inward FDI

Stock by Main Industrial Sector Destination (1) (FF billions)

	1996	1997	1998*	
Banking	26	23	29	
Companies (diversified)	30	26	22	
Chemicals	18	15	18	
Wholesale/Retail Trade	14	13	14	
Food, drinks, tobacco	11	8	10	
Insurance	3	4	8	
Energy		6	8	7
Mechanical engineering industries	6	6	--	
Metallurgical industries	5	5	--	
Paper, press, editing	4	4	5	
Office machines	5	--	--	
Transportation		4	--	--
Other retail services	7	--	--	
Other	6	34	36	
Total	134	145	161	

Average Exchange Rate: USD1.00 =

FF 5.1

FF 5.8

FF 5.9

(1) Book value of investment

*The Bank of France will publish 1999 data in August 2001

Table 3 - Inward FDI

Flows by Country of Origin (1) (USD billions)

	1997	1998	1999
OECD	17	24	41
EU, of which:	13	20	35
Netherlands	2	3	12
Belgium	1	2	10
United Kingdom	5	5	1
Germany	3	8	3
Italy	1	0	1
Spain	0	0	4
Other	1	3	3
North America, of which:	2	4	3
USA	2	4	3
Canada	0	0	0
Other OECD countries, of which	2	0	3
Switzerland	2	0	3

Japan	0	0	0
Other	0	0	0
Non-OECD Countries, misc.	1	0	0
Reinvested profits	0	0	0
Total	18	25	41
as a percent of GDP	1.3	1.7	2.9
Average Exchange Rate: USD1.00 =	FF 5.8	FF 5.9	FF6.2
(1) Market value of investment			
The Bank of France will publish 2000 data in August 2001			

Table 4 - Outward FDI
Stock by Country of Destination (1) (USD billions)

	1997	1998	1999 (prel)
OECD	155	174	226
EU, of which:	99	113	
n.a.			
Netherlands	23	25	26
United Kingdom	23	25	27
Belgium	14	21	35
Germany	11	12	17
Spain	11	11	10
Italy	7	9	9
Other	9	11	
n.a.			
North America, of which:	45	51	72
USA	43	48	70
Canada	2	3	2
Other OECD countries, of which	11	10	n.a.
Switzerland	9	8	8
Other	3	2	0
Non-OECD Countries, misc.	37	43	n.a.
Total	192	217	306
as a percent of GDP	13.7	15.0	
21.3			
Average Exchange Rate: USD1.00 =	FF 5.8	FF 5.9	
FF6.2			
(1) Book value of investment			

Table 5 - Outward FDI
Stock by Industrial Sector Destination (1) (USD billions)

	1996	1997	1998*	
Banking	34	34	38	
Companies (diversified)	23	19	22	
Energy	21	25	29	
Insurance	17	20	18	
Chemicals	15	9	17	
Processed food	15	12	13	
Metallurgical industries	9	8	8	
Mechanical engineering industries	8	9	12	
Transportation	7	6	7	
Repairs, trade	7	9	9	
Hotels, restaurants	5	5	5	
Other	36	37	37	
Total	198	192	217	
Average Exchange Rate: USD 1.00 = FF 5.1 FF 5.8 FF 5.9				
(1) Book value of investment				
The Bank of France will publish 1999 data in August 2001				

Table 6 - Outward FDI
Flows by Country of Destination (1) (USD billions)

	1997	1998	1999
OECD	22	34	98
EU, of which:	14	24	69
Germany	3	2	27
Belgium	2	9	26
United Kingdom	5	5	9
Italy	2	1	1
Spain	1	1	1
Netherlands	1	3	3
Other	0	2	3
North America, of which:	7	5	21
USA	6	5	21
Canada	0	0	0
Other OECD countries, of which	2	5	8
Switzerland	1	4	2
Other	0	1	6
Non-OECD Countries, misc.	6	6	8
Reinvested profits	1	0	0

Total	28	39	106
as a percent of GDP	2.0	2.7	7.4

Average Exchange Rate: USD1.00 = FF 5.8 FF 5.9 FF6.2

(1) Market value of investment

The Bank of France will publish 2000 data in August 2001

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E-mail: amchamfrance@amchamfrance.org
Web Site: <http://www.amchamfrance.org>

FRANCO-AMERICAN CHAMBER OF COMMERCE

Mrs. Claudine Serre, Director, French Chapter
104, rue de Miromesnil
75008 Paris
France
Tel: (33) 1.53.89.11.00
Fax: (33) 1.53.89.11.09
Web Site: <http://www.faccparisfrance.com>
E-mail: cserre@faccparisfrance.com

Country Chambers of Commerce and Industry

CHAMBER OF COMMERCE AND INDUSTRY OF PARIS - CCIP

Mrs. Delorme, North America Desk Officer
2, rue de Viarmes
75001 Paris
France
Tel: (33) 1.55.65.35.68
Fax: (33) 1.55.65.36.92
Web Site: <http://www.ccip.fr>
E- Mail: webmaster@ccip.fr

CHAMBER OF COMMERCE AND INDUSTRY OF VAL D'OISE - YVELINES

Mr. Jean-Francois Marmey, Director, International Trade
23, avenue de Paris
78021 Versailles Cedex
France
Tel: (33) 1.30.84.78.78
Fax: (33) 1.30.84.79.22
Web site: <http://www.cciv.net>
Or: <http://www.cciv-online.com>

Each district in France has a Chamber of Commerce and Industry.
For more information, consult with the Commercial Service France,
Tel: (33) 1.43.12.21.97; Fax: (33) 1.43.12.21.72

Country Trade and Industry Associations

IMPORTERS' ASSOCIATION FOR MECHANICS AND ELECTRONICS

Federation des Entreprises Industrielles et Commerciales
Internationales de la Mecanique et de l'Electronique (FICIME)

Ms. General Manager
25-27, rue d'Astorg
75008 Paris
France
Tel: (33) 1.44.51.14.60
Fax: (33) 1.42 .65.39.49
Web Site: <http://www.ficime.fr>
E-mail: info@ficime.fr

FRENCH EMPLOYERS ASSOCIATION
Mouvement des entreprises de France (MEDEF)
Ms. Marie Carmen Lourenco, American Desk Officer
31, avenue Pierre 1er de Serbie
75784 Paris Cedex 16
France
Tel: (33) 1.40.69.96 11
Fax: (33) 1.40 70 96 47
Web Site: <http://www.medef.fr>
E-Mail: mlourenco@medef.fr

APPLIANCE MANUFACTURERS' ASSOCIATION
Groupement Interprofessionnel des Fabricants d'Appareils d'Equipement Menager
(GIFAM)
Mr. Christian Brabant, President
39, avenue d'Iena
75783 Paris Cedex 16
France
Tel: (33) 1.53.23.06.53
Fax: (33) 1.47.20.20.73
Web Site: <http://www.gifam.fr>
E-mail: dnicaud@gifam.fr

AUTOMOTIVE EQUIPMENT INDUSTRY ASSOCIATION
Federation des Industries des Equipements pour Vehicules (FIEV)
Mr. Amaury Halna Du Fretay, President
Mr. Raymond Guaisco, Director
79, rue J.J. Rousseau
92158 Suresnes
France
Tel: (33) 1.46.25.02.30
Fax: (33) 1.46.97.00.80
Web Site: <http://www.fiev.fr>
E-mail: fiev@fiev.fr

BAKERY EQUIPMENT INDUSTRY ASSOCIATION
Union des Fabricants d'Equipements pour la Boulangerie et Patisserie (UFFEB)
Mr. Roger Messio, President
Mr. Jean-Paul Broutin, Secretary
13, rue Saint-Lazare
75009 Paris
France

Tel: (33) 1.55.07.82.22
Fax: (33) 1.42.85.29.00
E-mail: contact@uffeb.com
Web Site: <http://www.uffeb.com>

BUILDING MATERIALS AND QUARRIES INDUSTRY ASSOCIATION
Union Nationale des Industries de Carrieres et Matériaux de Construction (UNICEM)
Mr. Xavier Salmon-Legagneur, President
3, rue Alfred-Roll
75849 Paris Cedex 17
France
Tel: (33) 1.44.01.47.01
Fax: (33) 1.40.54.03.28
Web Site: <http://www.unicen.fr>

BUSINESS GIFTS PROFESSIONALS UNION
Syndicat des Producteurs de Cadeaux d'Affaires
Mr. Jean Paoli, President
34, boulevard Haussmann
75009 Paris
France
Tel: (33) 4.72.83.00.60
Fax: (33) 4.72.83.00.61
Web Site: <http://www.syprocal.fr>
E-mail: info@syprocal.fr

CHEMICAL INDUSTRY ASSOCIATION
Union des Industries Chimiques
Mr. Deleuze, President
Mr. Pierre Laroche, Project Officer
14, rue de la Republique
92800 Puteaux
France
Tel: (33) 1.46.53.11.00
Fax: (33) 1.46.53.11.05
Web Site: <http://www.uic.fr>
E-mail: uicgeneral@uic.fr

CYCLE MANUFACTURERS ASSOCIATION
Conseil Nationale de Profession du Cycle
Mr. Alain Goutzmann, General Manager
79, rue J.J. Rousseau
92158 Suresnes, France
Tel: (33) 1.46.25.02.35
Fax: (33) 1.40.99.06.20
Web Site: <http://www.tousavelo.com>
E-mail: gjacques@siev.fr

FARM MACHINERY INDUSTRY ASSOCIATION
Syndicat General des Constructeurs de Tracteurs et Machines Agricoles (SYGMA)
Mr. Michel Siebert, President

Mr. Dominique Opillard, International Trade
19, rue Jacques Bingen
75017 Paris
France
Tel: (33) 1.42.12.85.90
Fax: (33) 1.40.54.95.60
Web Site: <http://www.sygma.org>
E- mail: j.dehollain@sygma.org

FEDERATION OF ELECTRIC AND ELECTRONIC INDUSTRIES
Federation des Industries Electriques, Electroniques et des Communications (FIEE)
Mr. François Mauduit, President
11-17, rue Hamelin
75783 Paris Cedex 16
France
Tel: (33) 1.45.05.70.70
Fax: (33) 1.45.53.03.93
Web Site: <http://www.fieec.fr>
E-mail: mpde/shaye/s@fieec.fr

FRENCH FEDERATION OF JEWELRY, GOLDSMITHING, GIFTS, DIAMONDS, GEMS,
PEARLS AND RELATED ACTIVITIES
Federation Francaise de la Bijouterie, Joaillerie, Orfevrerie, du Cadeau, des Diamants,
Pierres et Perles et Activites qui s'y rattachent
Mr. Didier Roux, President
58, rue du Louvre
75002 Paris
France
Tel: (33) 1.40.26.98.00
Fax: (33) 1.40.26.29.51
Web Site: <http://www.bjo-france.com>
E-mail: info@bjo.france.com

FRENCH FEDERATION OF TOY INDUSTRIES
Federation Francaise des Industries du Jouet/Puericulture
Mr. Daniel Aboaf, general representative
103, rue Lafayette
75481 Paris Cedex 10
France
Tel: (33) 1.40.16.25.70
Fax: (33) 1.40.16.25.71
Web Site: <http://www.fjp.fr>
E-mail: FJP@wanadoo.fr

FRENCH FISHING EQUIPMENT INDUSTRY ASSOCIATION
Groupement d'Industrie Francaise d'Articles de Pêche
Mr. Hughes Nello, President
17, rue Arnoux
92340 Bourg-la-Reine
Tel: (33) 1.47.02.96.01
Fax: (33) 1.40.91.03.24

FRENCH INTERNATIONAL TRADE ASSOCIATION

Confederation Francais du Commerce de Gros Interentreprises et du Commerce International (CGI)

Mr. Guy Laporte, President

31, avenue Pierre-1er-de-Serbie

75784 Paris Cedex 16

France

Mailing address:

18, rue des Pyramides

75001 Paris

France

Siege administratif (Administrative office) :

Tel: (33) 1.44.55.35.00

Fax: (33) 1.42.86.01.83

E-mail: cgi@cgi-cf.com

Web Site: <http://www.cgi-cf.com>

FRENCH AERONAUTIC AND SPACE INDUSTRY ASSOCIATION

Groupement des Industries Francaises Aeronautiques et Spatiales (GIFAS)

Mr. Jean-Paul Bechat, President

4, rue Galilee

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E-mail: infogifas@gifas.assos.fr

Web Site: <http://www.gifas.asso.fr>

FRENCH AUTOMOBILE MANUFACTURERS COMMITTEE

Comite des Constructeurs Francais d'Automobiles

Mr. De Belabre, President

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75008 Paris

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Web Site: <http://www.ccfa.fr>

GAS AND PETROLEUM INDUSTRY ASSOCIATION

Groupement des Entreprises Parapetrolieres et Paragazieres (GEP)

Mr Jacques Bouvet, President

45, rue Louis Blanc

92038 Paris La Defense Cedex

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Fax: (33) 1.41.17.67.47

E-mail: h.tarabout@jep-france.com

Web Site: <http://www.jep-france.com>

LABORATORY EQUIPMENT INDUSTRY ASSOCIATION

Chambre Syndicale des Fabricants et Negociants d'Appareils de Laboratoire
(FABRILABO)

Mr. Joël Cinier, President

39-41, rue Louis Blanc

92038 Paris La Defense Cedex 72

France

Tel: (33) 1.47.17.64.05

Fax: (33) 1.47.17.64.81

E-mail: contact@fabrilabo.com

Web Site: <http://www.fabrilabo.com>

MEASURING AND CONTROL EQUIPMENT INDUSTRY ASSOCIATION

Syndicat de la Mesure

Mr. Charles Michel Gouge, President

39-41, rue Louis Blanc

92400 Courbevoie

France

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Fax: (33) 1.43.34.76.82

E-mail: mesure@syndicat-mesure-fr

Web Site: <http://www.syndicat-mesure.fr>

MECHANICAL ENGINEERING INDUSTRIES ASSOCIATION

Federation des Industries de la Mecanique (FIM)

Mr. Marc Bay, Director

39-41, rue Louis Blanc

92400 Courbevoie

Mailing address:

92038 Paris La Defense Cedex

France

Tel: (33) 1.47.17.60.00

Fax: (33) 1.47.17.64.99/37

E-mail: cbilalian@fimeca.com

MEDICAL INDUSTRY ASSOCIATION

Syndicat National de l'Industrie des Technologies Medicales (SNITEM)

Mr. Dumont, President

39-41, rue Louis Blanc

92400 Courbevoie

Mailing address:

92038 Paris La Defense Cedex

France

Tel: (33) 1.47.17.63.88

Fax: (33) 1.47.17.63.89

Web Site: <http://www.snitem.fr>

E-mail: info@snitem.fr

MINERALS AND NON-FERROUS METALS INDUSTRY ASSOCIATION

Federation des Chambres Syndicales des Minerais, Mineraux industriels et des Metaux non Ferreux

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75008 Paris
France
Tel: (33) 1.45.63.02.66
Fax: (33) 1.45.63.61.54
Web Site: <http://www.mineraux-et-metaux.org>
E-mail: fmmnfx@aol.com

MOTION PICTURE INDUSTRY ASSOCIATION
Federation du Spectacle
Mr. Jean Voirin, Secretary-General
14-16, rue des Lilas
75019 Paris
France
Tel: (33) 1.48.03.87.60
Fax: (33) 1.42.40.90.20
E-mail: fnsac@cgt.fr
Web Site: <http://www.fnsac.cgt.fr>

NATIONAL UNION OF PRODUCT ADVERTISING
Syndicat National de la Publicite par l'Objet
Mr. Thierry Bertrand, President
66 rue des Cévennes
75015 Paris
France
Tel: (33) 1.45.58.32.76
Fax: (33) 1.40.60.04.51
E-mail: info@europv.com

NATIONAL BUILDING FEDERATION
Federation Nationale du Batiment
Mr. Sionneau, President
33, avenue Kleber
75784 Paris Cedex 16
France
or
6-14, rue La Perouse
75016 Paris
France
Tel: (33) 1.40.69.51.00
Fax: (33) 1.45.53.58.77
Web Site: <http://www.ffbatiment.fr>

NATIONAL FEDERATION OF PUBLIC WORKS
Federation Nationale des Travaux Publics (FNTTP)
Mr. Daniel Tardy, President
3, rue de Berri
75008 Paris
France
Tel: (33) 1.44.13.31.10
Fax: (33) 1.44.13.32.47

E-mail: Tardyd@sntp.fr
Web Site: <http://www.fntp-fr>

NATIONAL CONFEDERATION WOOD INDUSTRY FOR CONSTRUCTION

Union des Industries du Bois
Mr. Jean-Daniel Debarge, President
33, rue de Naples
75008 Paris
France
Tel: (33) 1.53.42.15.50
Fax: (33) 1.53.42.15.51
Web Site: <http://www.industriesdubois.com>

NATIONAL ASSOCIATION OF HOME REPAIR AND RELATED HOBBIES

Union Nationale des Industries de Bricolage et jardinage
Mr. Caille, President
61, rue de l'Arcade
75008 Paris
France
Tel: (33) 1.53.42.36.42
Fax: (33) 1.42.93.26.62
Web Site: <http://www.unibal.com>
E-mail: vebeur.bravo.oscaruniform.bourbier@unibal.com

NATIONAL UNION OF FRENCH FURNITURE INDUSTRIES (UNIFA)

Union Nationale des Industries Francaises de l'Ameublement
Mr. Henri Griffon, President
28 bis, avenue Daumesnil
75012 Paris, France
Tel: (33) 1.44.68.18.00
Fax: (33) 1.44.74.37.55
Web Site: <http://www.meuble-france.com/fr>
E-mail: accueil.ifa@mobilier.com

NATIONAL WOOD FEDERATION

Federation Nationale d'Exploitants Forestiers, Scieurs du Bois
Mr. Dominique Juillot, President
6, rue François Ier
75008 Paris
France
Tel: (33) 1.56.69.52.00
Fax: (33) 1.56.69.52.09
Web Site: <http://www.fnbois.com>
E-mail: infos@nfbois.com

NAUTICAL INDUSTRY FEDERATION

Federation des Industries Nautiques
Mrs. Annette Roux, Chief Representative
Port de Javel-haut
75015 Paris
France

Tel: (33) 1.44.37.04.00
Fax: (33) 1.45.77.21.88
Web Site: <http://www.france-nautic.com>
E-mail: fin@francenautic.com

OPTICAL INDUSTRY ASSOCIATION

Groupement des Industries Francaises de l'Optique (GIFO)

Mr. Bertrand de Lime, President

185 rue de Bercy Cedex 12

75579 Paris

France

Tel: (33) 1.43.46.27.50

Fax: (33) 1. 43.46.27.58

E-mail: gifo@gifo.org

Web Site: <http://www.gifo.org>

PAINTS & INKS INDUSTRY ASSOCIATION

Federation des Industries des Peintures, Encres, Couleurs, Colles et Adhesives (FIPEC)

Mr. Michel Magnan, President

42, avenue Marceau

75008 Paris

France

Tel: (33) 1.53.23.00.00

Fax: (33) 1.47.20.90.30

Web Site: <http://www.fipec.org>

E-mail: president@fipec.org

PAPER, CARDBOARD, CELLULOSE INDUSTRY ASSOCIATION

Confederation Francaise de l'Industrie des Papiers, Cartons et Celluloses (COPACEL)

Mr. François Wanecq, President

154, boulevard Haussmann

75008 Paris

France

Tel: 33 (1) 53.89.24.00

Fax: 33 (1) 53.89.24.01

Web Site: <http://www.copacel.fr>

E-mail: contacts@copacel.fr

PERFUME INDUSTRY ASSOCIATION

Federation des Industries de la Parfumerie (FIP)

Mr. Alain Grangé-Cabane, President

33, avenue des Champs-Élysées

75008 Paris

France

Tel: (33) 1.56.69.67.89

Fax: (33) 1.56.69.67.90

E-mail: fipar@fipar.com

PHARMACEUTICAL INDUSTRY ASSOCIATION

Federation Francaise des Industries du Medicament (FEFIM)

Mr. Jean-Jacques Bertrand, President
88, rue de la Faisanderie
75782 Paris Cedex 16
France
Tel: (33) 1.45.03.88.61
Fax: (33) 1.45.04.07.98
Web Site: <http://www.snip.fr>
E-mail: dcre@cnip.fr

PHOTOGRAPHIC AND VIDEO EQUIPMENT INDUSTRY ASSOCIATION
Syndicat des Equipements Photographiques et de l'Image (SEPIM)
Mr. Jean-Pierre Berlioz, President
5 bis, rue Jacquemont
75017 Paris, France
Tel: (33) 1.40.25.96.65
Fax: (33) 1.42.29.02.22
E-mail: ffii@wanadoo.fr

PLASTIC TRANSFORMERS FEDERATION
Federation de la Plasturgie
Mr. Emmanuel Paturle, President
65, rue de Prony
75854 Paris Cedex 17
France
Tel: (33) 1.44.01.16.16
Fax: (33) 1.44.01.16.55
Web Site: <http://www.proplast.org>
E-mail: accueil@fed-plasturgie.fr

PRINTING AND GRAPHIC ARTS FEDERATION
Federation de l'Imprimerie et de la Communication Graphique (FICG)
Mr. François Gutlé, President
68, boulevard St. Marcel
75005 Paris
France
Tel: (33) 1.44.08.64.46
Fax: (33) 1.43.36.09.51
E-mail: ficg@ficg.fr
Web Site: <http://www.ficg.fr>

PROFESSIONAL UNION OF PLASTICS MANUFACTURERS
Syndicat des Producteurs de Matière Plastique
Mr. Dominique Huillard, President
14, rue de la République
92800 Puteaux
France
Tel: (33) 1.46.53.10.53
Fax: (33) 1.46.53.10.73/10.75
Web Site: <http://www.proplast.org>

RAILROAD INDUSTRY FEDERATION

Federation des Industries Ferroviaires

Mr. Jean Claude Berthod, President

12, rue Bixio

75007 Paris

France

Tel: (33) 1.45.56.13.53

Fax: (33) 1.47.05.29.17

Web Site: <http://www.fif.asso.fr>

E-mail: carollecluksa@dial.oleane.com

SHIP BUILDERS UNION

Chambre Syndicale des Constructeurs de Navires

Mr. Alain Grill, President

47, rue de Monceau

75008 Paris

France

Tel: (33) 1.53.89.52.00

Fax: (33) 1.53.89.52.15

E-mail: CSCN@club-internet.fr / CCAF@ccaf.asso.fr

SPORTING GOODS INDUSTRY ASSOCIATION

Federation Francaise des Industries du Sport et des Loisirs (FIFAS)

Mr. Roger Pascale, President

Ms. Nicole Berthier-Stoops, Managing Director

3 rue Jules Guesde

92300 Levallois

France

Tel: (33) 1.47.31.56.23

Fax: (33) 1.47.31.56.32

E-mail: contact@fifas.com

Web Site: <http://www.fifa.com>

STATIONARY PRODUCERS' UNIONS

Federation des Articles de Papeterie

Mr. Francois Nusse, President

71, avenue Marceau

75116 Paris

France

Tel: (33) 1.47.20.90.12

Fax: (33) 1.49.52.05.88

STATIONARY AND OFFICE PRODUCTS ASSOCIATION

Association Francaise d'Articles de Papeterie et des Fournitures de Bureau

Mr. Franck Toffa, President

12, rue des Pyramides

75001 Paris

France

Tel: (33) 1.42.60.11.59

Fax: (33) 1.42.60.12.03

E-mail: A-I-P-B@wanadoo.fr

Web Site: <http://www.aipb.asso.fr>

TELECOMMUNICATION INDUSTRY UNION

Groupeement des Industries de Telecommunications et d'Electronique Professionnelle (GITEP)

Mr. Noël Claveloux, President

Mr. Antoine Weil, Chief Representative

11, rue Hamelin

75783 Paris Cedex 16

France

Tel: (33) 1.45.05.71 Fax: (33) 1.47.55.66.22

Web Site: <http://www.gitep.fr>

E-mail: gr.industries@gitep.fr

TEXTILE INDUSTRY UNION

Union des Industries Textiles

Mr. Guillaume Jarkozy, President

37-39, rue de Neuilly

92110 Clichy

Tel: (33) 1.47.56.31.21

Fax: (33) 1.47.30.25.28

Web Site: <http://www.textile.fr>

E-mail: uit@textile.fr

UNION OF PLASTIC AND RUBBER INDUSTRY DISTRIBUTORS

Union pour Industries et de la Distribution des Plastiques et du Caoutchouc (UCAPLAST)

Mr. Jean Peyronnet, President

37-39 rue de Pommard

75012 Paris

France

Tel: (33) 1.55.78.28.98

Fax: (33) 1.55.78.28.99

E-mail: ucaplast@ucaplast.fr

Web Site: <http://www.ucaplast.fr>

VETERINARIAN DRUG INDUSTRY ASSOCIATION

Syndicat de l'Industrie du Medicament Veterinaire (SIMV)

Mr. Jacques Cuvellier, President

109, boulevard Haussman

75008 Paris

France

Tel: (33) 1.53.30.04.00

Fax: (33) 1.53.30.06.05

Web Site: <http://www.simv.org>

E-mail: simv@wanadoo.fr

Note: This list is not exhaustive. The Commercial Service at the American Embassy in Paris maintains an up-to-date and comprehensive listing of industry associations.

COUNTRY MARKET RESEARCH FIRMS

A.C. NIELSEN
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95007 Cergy-Pontoise, France
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Fax: (33) 1.30.38.60.77
Web Site: <http://www.acnielsen.fr>

ADEGE
Mr. G. Saurais, President
10, rue des Marronniers
69002 Lyon
France
Tel: (33) 4.72.77.81.40
Fax: (33) 4.72.77.81.41
Web Site: <http://www.adege.fr>
E-mail: adege@adege.fr

ALGOE
Mr. Debrinay, President
Mr. Grolleau, Vice-president
9 bis, route de Champagne
69134 Ecuilly Cedex
France
Tel: (33) 4.72.18.12.00
Fax: (33) 4.72.18.13.90
E-mail: gerarddebrinay@algie.fr
Web Site: <http://www.algie.fr>

ARTHUR D. LITTLE FRANCE
Mr. Eric Belot, President and Managing Director
50, avenue Théophile Gautier
75016 Paris
France
Tel: (33) 1.55.74.29.00
Fax: (33) 1.55.74.28.00
Web Site: <http://www.arthurdlittle.com>

AVISO CONSEIL
Mr. B. Vincent, President and Managing Director
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France
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Fax: (33) 4.78.42.16.10
E-mail: avisocpj@aviso.fr

B.V.A (Brule Ville Associates)
Mr. Chapot, Director

191, avenue du General Leclerc
72222 Viroflay Cedex
France
Tel: (33) 1.30.84.88.00
Fax: (33) 1.30.84.88.01
Web Site: <http://www.bva.fr>

CATHERINE DELANNOY & ASSOCIATES
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E-mail: cdalescus@cdalescues-france.com

CEGOS
Mr. Coquerel, General Manager
Tour Chenonceaux
11-13 rue René Jacques
92798 Issy-les Moulinaux Cedex 9
France
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Fax: (33) 1.55.00.99.00
Web Site: <http://www.egos.fr>
E-mail: espace-participant@egos.fr

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E-mail: esop-survey@magic.fr

E.S.T.E.L.
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1, rue Alsace Lorraine
94140 Alfortville
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GROUPE MV2
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92120 Montrouge
France
Tel: (33) 1.46.73.31.31

Fax: (33) 1.46.73.31.60

Note: The Commercial Service and the Office of Agricultural Affairs at the American Embassy in Paris maintain current and comprehensive listing of market research firms. As functions, contacts, and assigned responsibilities change often, interested exporters are requested to direct specific inquiries to the Commercial Service or to the Office of Agricultural Affairs at the American Embassy in Paris for up-to-date references.

Country Commercial Banks

- French Subsidiaries of U.S. Banks:

AMERICAN EXPRESS INTERNATIONAL BANKING CORPORATION

Mr. Piero Grandi, President, Managing Director

11, rue Scribe

75009 Paris

France

Tel: (33) 1.47.14.50.00

Fax: (33) 1.42.68.17.17

Web Site: <http://www.amexbank.fr>

BANK OF AMERICA

Mr. Jean Pierre Maréchal, President, Managing Director

43-47, avenue de la Grande Armée

75782 Paris Cedex 16

France

Tel: (33) 1.45.02.68.00

Fax: (33) 1.45.01.77.89

Web Site: www.bankamerica.com

BANK OF NEW-YORK

Mrs. Deidre Perroux, President, Managing Director

13, 15, boulevard de la Madeleine

75001 Paris

France

Tel: (33) 1.42.97.90.20

Fax: (33) 1.42.97.43.73

Web Site: <http://www.bankofny.com>

CHASE MANHATTAN BANK SA

Mr. Jean-Olivier Bartholin, General Manager

40-42, rue de Washington

75008 Paris, France

Tel: (33) 1.53.77.10.00

Fax: (33) 1.53 77 10 50

Or (33) 1.53 77 14.49

E-mail: Solange.Janet@chase.com

CITIBANK

Mr. Jean-Claude Gruffet, General Manager

Citicenter, 19 Le Parvis
92073 Paris La-Defense Cedex 36
France
Tel: (33) 1.49.06.14.15
Fax: (33) 1.47.67.14.17
Web Site: <http://www.citibank.com>

MORGAN GUARANTY TRUST CO OF NEW-YORK
Mr. Philippe Lagayette, President, Managing Director
14 Place Vendome
75001 Paris
France
Tel: (33) 1.40.15.45.00
Fax: (33) 1.40.15.44.77
Web Site: <http://www.jpmmorgame.com>

REPUBLIC NATIONAL BANK OF NEW-YORK
Mr. Mac Comole, Managing Director
20, place Vendome
75001 Paris
France
Tel: (33) 1.44.86.18.61
Fax: (33) 1.40.20.94.85

- French and other Foreign Banks:

ASSOCIATION FRANCAISE DES BANQUES - AFB
Mr. Jean Laurent, President
18, rue Lafayette
75440 Paris Cedex 09
France
Tel: (33) 1.48.00.52.52
Fax: (33) 1.42.46.76.40
Web Site: <http://www.afb.fr>

The Commercial Service at the American Embassy in Paris maintains an up-to-date and comprehensive listing of commercial banks.

Country Transportation and Logistics

- Professional associations

FEDERATION DES ENTREPRISES DE TRANSPORT ET DE LOGISTIQUE DE FRANCE
Mr Cornede general manager
13,rue de Calais
75320 Paris Cedex09
Tel: (33) 1 53 32 13 13
Fax: (33) 1 53 32 77 44
Email: tlf@tlf.fr

Web Site: n/a

ASSOCIATION FRANCAISE DU TRANSPORT ROUTIER INTERNATIONAL

Mme. Françoise ANTIGNAC, External relations

48, rue de la bienfaisance

75008 Paris

France

Tel: (33) 1 53 53 02 40

Fax: (33) 1 53 76 13 03

Email: aftri@wanadoo.com

Web Site: <http://www.aftri.com>

- **Logistic firms**

AIR FRANCE CARGO

Mr MARCHESSAUX, Logistic manager

1, place de Londres

95703 ROISSY EN FRANCE

Tel : (33) 1 48 64 34 77

Fax : (33) 1 48 64 34 74

Email: humarchesseaux@airfrance.fr

Web site: <http://www.airfrance.com>

AIR LIBERTE CARGO

Mr.Didier BONELLO, Cargo Manager

67, rue de Montlhéry

Silic 172

84533 Rungis Cedex

France

Tel: (33) 1 49 79 23 46

Fax: (33) 1 49 79 23 72

Email: didier.bonello@air-liberte.fr

Web Site: <http://www.air-liberte.fr>

British Airways World Cargo

Mr. Fabrice Clauzon, Sales director France

10, rue du Pavé B.P 10312

95705 Roissy-Aéroport

France

Tel: (33) 1 48 16.60.21

Fax: (33) 1 48 62 20 45

Email: fabrice-1-clauzon@british-airways.com

Web Site: <http://www.britishairways.com>

CALBERSON

Mr. Denis ZIMMER, Sales director

183, avenue de Clichy

75008 Paris

Tel (33) 1 44 85 15 00

Fax (33) 1 42 28 50 00

Email: n/a

Web Site: <http://www.calberson.com>

DHL INTERNATIONAL

Mrs Anne Céline Martel, Marketing
Z.I Paris Nord 2-241, rue de la Belle-Etoile
95957 Roissy-CDG
Tel (33) 1 49 38 70 00
Fax (33) 1 49 38 74 54
Email: amartel@cdg-co.fr.dhl.com
Web Site: <http://www.dhl.fr>

EXEL LOGISTICS

Mr.Bannier general director
150, rue Gallieni
92100 Boulogne
Tel: (33) 1 41 86 33 33
Fax: (33) 1 41 86 33 34
Web site: <http://www.exel.com>

EXPEDITORS INTERNATIONAL FRANCE SA

Christophe Richard, Managing Director
Rue du Prè
BP 10679
95 725 Roissy CDG Cedex
Tel: (33) 1 49 19 50 58
Fax: (33) 1 48 62 75 51
Web Site: <http://www.expd.com>

FEDEX

Mr. Gilles TROADEC, Sales director
125, avenue Louis Roche
92230 GENNEVILLIERS
Tel : (33) 1 49 19 91 91
Fax: (33) 1 40 85 38 53
Email: gtroadec@fedex.com
Web Site: <http://www.fedex.com>

GARONOR, (logistical infrastructures)

Mr.François De Laroche Foucaud , Sales director
B.P 780
93614 Aulnay sous Bois Cedex
Tel (33) 1 48 14 55 55
Fax (33) 1 48 65 30 40
Email : info@garonor.prologis.com
Web Site: <http://www.prologis.com>

GEODIS

Mr. Jean ELISSECHE, Sales director
183, avenue de Clichy
75017 Paris
Tel (33) 1 53 06 12 00

Fax (33) 1 53 06 12 01
Web Site: <http://www.geodis.com>

REGUS (Office services)
Mr. Thierry MOSCHETTI, Sales director
Mr Olivier Français
72, rue du Faubourg St Honoré
75008 Paris
Tel : (33) 1 40 07 80 07
Fax : (33) 1 40 07 80 20
Email: paris72faubourgsthonore:5@regus-sa.fr
Web Site: <http://www.regus.com>
<http://www.regus-sa.fr>

SERNAM
Mr. Patrick GODIN, Sales director
116, rue de Saussure
75840 Paris Cedex 17
Tel (33) 1 44 15 44 15
Fax (33) 1 44 15 44 11/1 44 15 44 59
Email: n/a
Web site: n/a

SNCF FRET
Tony DUCHE, International Relations
10, place de Budapest
75009 Paris
Tel (33) 1 53 25 60 84
Fax (33) 1 53 25 78 98
Email: tony.duche@sncf.fr
Web site: <http://www.sncf.fr>

TNT
Mr. Christophe Legrais, Sales director
3 Bis, avenue Evariste Galois BP 30
93151 Le Blanc Mesnil Cedex
Tel : (33) 1 48 14 43 55
Fax : (33) 1 48 14 48 14
Email: n/a
Web Site: <http://www.tntew.com>

UPS
Mr. Mark KHAYAT, Sales director
12, rue Clement-Ader
93210 La Courneuve
Tel (33) 1 48 38 84 22
Fax (33) 1 48 38 92 21
Email: n/a
Web Site: <http://www.ups.com>

Upcoming Industry Sector Analyses for FY 2002 (ISA)

• Pleasure Boats (PLB)	01/31/2001
• New Applications in Composites (CMT)	04/30/2002
• Men's Wear (APP)	05/07/2002
• Defense Industry (DFN)	06/30/2002
• Swimwear (APP)	07/30/2002
• Lingerie (APP)	07/30/2002
• Diesel Parts & Services / Automotive (APS)	08/30/2002
• Computer Storage (CPT; CSF; CSV)	09/30/2002
• Franchising (FRA)	08/31/2002
• Anti-Graffiti Products & Services (ICH)	07/31/2002
• Medical Equipment (MED)	09/15/2002
• Oil and Gas Equipment (OGM)	08/30/2002
• Travel and Tourism (TRA)	08/30/2002
• Trends in the IT Market(TEL; TES)	09/30/2002
• Civil Aviation (AIR)	09/30/2002
• Renewable Energy (REQ)	09/30/2002
• Food Packaging Equipment (FPP)	09/30/2002
• Plastics (PMR)	09/30/2002
• Education Services (EDS)	12/30/2001

A complete list of market research is available on the CS web site:

(<http://www.stat.usa.doc.gov>)

October 2001 / December 2002

DATE CITY	TRADE SHOW / INDUSTRY ORGANIZER TELEPHONE, FACSIMILE WEB SITE E-MAIL
10/2001 Paris	FORUM BENTLEY / European Microstations Event BIRP T: (33) 1.53.17.11.40 / F: (33) 1.53.17.11.45 Web site : www.birp.com E-mail : birp@birp.fr
10/2/2001 Poitiers	CECOM / Trade show for Local Collectivities EXPOSIUM AUBAGNE T: (33) 4.42.18.01.70 / F: (33) 4.42.18.01.71 Web site : www.exposium.fr E-mail: aubagne@exposium.fr
10/2-4/2001	EXPOSITION DE LA PHYSIQUE/French Physics Show

Paris	<p>SOCIETE FRANCAISE DE PHYSIQUE T: (33) 1.44.08.67.14 / F: (33) 1.44.08.67.19 Web site: under construction E-mail: sfp-expo@ihp.jussieu.fr</p>
10/2-3/2001 Paris	<p>SELECTION PREMIERE / Clothing Industry Innovations FEDERATION DE LA MAILLE T: (33) 1.47.56.32.32 / F: (33) 1.47.56.32.99 Web site: www.interselection.com E-mail: interselection@la-federation.com</p>
10/4-7/2001 Paris	<p>MOD'AMONT / Fashion Trimmings and Supplies Trade Fair SEPIC T: (33) 1.44.71.71.71 / F: (33) 1.44.71.04.04 Web site: www.modamont.com E-mail: modamont@laposte.fr</p>
10/5-7/2001 Paris	<p>PREMIERE VISION / The World's Premier Fabric Show PREMIERE VISION T: (33) 4.72.60.65.00 / F: (33) 4.72.60.65.09 Web site: www.premiere.fr E-mail: info@premierevision.fr</p>
10/5-7/2001 Paris	<p>MONDIAL REEDUCATION GROUPE 76 T: (33) 1.56.88.16.76 / F: (33) 1.56.88.16.75 Web site : www.groupe76.fr E-mail: info@groupe76.fr</p>
10/9-11/2001 Grenoble	<p>INTERNET ENTREPRISE CCI de Grenoble T: (33) 4.76.28.28.80 / F: (33) 4.76.28.27.95 Web site: www.grenoble.cci.fr/salon-internet E-mail: raphael.pin@grenoble.cci.fr</p>
10/9-11/2001 Grenoble	<p>IP / International Trade Fair for Paper-making Industries CCI de Grenoble T: (33) 4.76.28.28.80 / F: (33) 4.76.28.27.95 Web site: www.ip-grenoble.cci.fr E-mail: ip@grenoble.cci.fr</p>
10/10-12/ 2001 Lille	<p>TEN / 4th European Transport and Logistics Show REED EXPOSITIONS FRANCE T: (33) 1.47.56.52.74 / F: (33) 1.47.56.08.68 Web site: www.itle.com E-mail: info@itle.com</p>
10/10-12/2001 Information Paris	<p>FORUM DE LA GEIDE / Electronic Management and M&CI T: (33) 1.44.53.72.20 / F: (33) 1.44.53.72.22</p>

Web site: www.forum-geide.com
E-mail: mci.salons@wanadoo.fr

10/10-13/2001
Paris

MIT INTERNATIONAL / International Exhibition of Tourism
GROUPE LIAISONS
T: (33) 1.41.29.75.48 / F: (33) 1.41.29.75.58
Web site: www.mitinternational.com
E-mail: mitinternational@groupe liaisons.fr

10/12-15/ 2001
Paris

PARIS SUR MODE / Women's Designer Ready-to-wear Fashion
COMEXPO PARIS
T: (33) 1.49.09.64.04 / F: (33) 1.49.09.61.06
Web site: www.comexpo-paris.com
E-mail: modes@comexpo-paris.com

10/12-15/2001
Paris

PREMIERE CLASSE / Designer Fashion Accessories
PREMIERE CLASSE
T: (33) 1.40.13.74.70 / F: (33) 1.40.13.74.80
Web site: www.premiere-classe.com
E-mail: pourrat@whosnext.com

10/12-15/2001
Paris

ATMOSPHERE D'ETE / Fashion Accessories & Designer
Collections
COMEXPO PARIS
T: (33) 1.49.09.64.04 / F: (33) 1.49.09.61.06
Web site: www.comexpo-paris.com
E-mail: modes@comexpo-paris.com

10/16-21/2001
Original

EQUIPAUTO / International Exhibition of Automotive
Equipment, Spare Parts, Customer Services, Garage Equipment
Paris
COMEXPO PARIS
T: (33) 1.49.09.61.30 / F: (33) 1.49.09.64.10
Web site: www.equipauto.com
E-mail: transport@comexpo-paris.com
U.S. Pavilion - Trade Fair Certified by the U.S. Department of
Commerce
FCS/France contact: E-mail: Ben.Muirheid@mail.doc.gov

10/17-18/2001
Paris

PMF / Professional Raw Materials and Supplies Fair
SEPIC
T: (33) 1.44.71.71.71 / F: (33) 1.44.71.04.04
Web site: www.chaussuredefrance.com
E-mail: chaussuredefrance@laposte.fr

10/19-22/ 2001
Paris

SILMO / International Optics and Eyewear Exhibition
COMEXPO PARIS
T: (33) 1.49.09.61.35 / F: (33) 1.49.09.60.03
Web site: www.silmo.fr
E-mail: info@silmo.fr

10/20-22/2001 Paris	DIETEBIO / Exhibition of Organic Food, Health and Natural Beauty Products REED OIP T: (33) 1.41.90.47.60 / F: (33) 1.41.90.47.69 Web site: http://dietebio.reed-oip.fr E-mail: dietebio@reed-oip.fr
10/20-22/2001 Food Paris	DIETEXPO / Exhibition of Health Products and Organic COMEXPO PARIS T: (33) 1.49.09.60.00 / F: (33) 1.49.09.60.03 Web site: www.comexpo-paris.com E-mail: info@comexpo-paris.com
10/22-25/2001 Satellite Paris	ANTENNES ET COLLECTIVITES RESEAUX / Cable and Trade Show REED OIP T: (33) 1.41.90.48.50 / F: (33) 1.41.90.48.59 Web site: http://antennes.reed-oip.fr E-mail: antennes@reed-oip.fr
10/22-25/2001 Paris	SATIS / Sound and Image Technologies Exhibition REED OIP T: (33) 1.41.90.48.45 / F: (33) 1.41.90.48.29 Web site : http://satis.reed-oip.fr E-mail: satis@reed-oip.fr
10/23-25/ 2001 Paris	CARTES / International forum for Card Technologies and Secure Applications EXPOSIUM T: (33) 1.49.68.52.64 / F: (33) 1.47.37.75.09 Web site: www.cartes.com E-mail: cartes@exposium.fr
10/23-25/2001 Paris	SATIS / Image & Sound Equipment REED-OIP T: (33) 1.41.90.48.45 / F: (33) 1.41.90.48.39 Web site: www.satis.reed-oip.fr E-mail: satis@reed-oip.fr
10/23-25/2001 Paris	CABLING SYSTEMS EUROPE / High Tech Material EXPOSIUM T: (33)1.49.68.51.00 / F: (33)1.49.68.54.66
10/23-25/2001 Paris	SEMAINE DES TELECOMS & DES RESEAUX / Mobile Communications EXPOSIUM T: (33) 1.49.68.51.85 / F: (33) 1.49.68.51.78 Web site: www.semainedelecomsetdesreseaux.com

E-mail: dhabjadja@exposium.fr

10/23-25/2001
Paris

SEMAINE DE L'ELECTRONIQUE / Microelectronics
EXPOSIUM
T: (33) 1.49.68.51.00 / F: (33) 1.47.37.74.38
Web site: www.exposium.fr

10/23-26/2001
Lyon

EUROPACK / Packaging Equipment
EXPOSIUM
T: (33) 1.49.68.54.41 / F: (33) 1.49.68.54.45
Web site: www.emballage2000.com
E-mail: emballage@exposium.fr

10/23-26/2001
Lyon

EUROPACK- EUROMANUT / Forum for Product Packaging,
Storage and Distribution
EXPOSIUM
T: (33) 1.49.68.51.00 / F: (33) 1.49.68.54.45
Web site: www.exposium.com
E-mail: europack-euromanut@exposium.fr

10/27-29/2001
Paris

PARTIR EN HIVER / Winter Vacations
REED EXPOSITIONS FRANCE
T: (33) 1.47.56.21.35 / F: (33) 1.47.56.50.67
Web site: www.topresa.com
E-mail: gerald_duport@reedexpo.fr

11/3-8/2001
Paris

EQUIP'HOTEL / Restaurant, Hotel, Bar and Catering Industries
REED EXPOSITIONS FRANCE
T: (33) 1.47.56.52.89 / F: (33) 1.47.56.12.67
Web site: www.equiphotel.tm.fr
E-mail: info@equiphotel.tm.fr

11/6-8/2001
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FATEX / Clothes & Textile industry
CEP
T: (33) 1.49.09.64.82 / F: (33) 1.49.09.60.03
Web site: www.fatex.fr
E-mail: pro-fatex@wanadoo.fr

11/5-10/2001
Paris

BATIMAT / International Building Exhibition
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T: (33) 1.47.56.51.68 / F: (33) 1.47.56.08.18
Web site: www.batimat.com
E-mail: info@batimat.com
U.S. Pavilion – Trade Fair certified by U.S. Department of
Commerce
FCS/France contact: E-mail: Igor.lepine@mail.doc.gov

11/6-11/2001
Paris

MONDIAL DU TRANSPORT ROUTIER / International Road
Transport Exhibition
AMC PROMOTION
T: (33) 1.56.88.22.40 / F: (33) 1.42.56.50.80

Web site: www.mondial-automobile.com
E-mail: info@amcpromotion.com

11/15-17/2001
Paris

JIB / International Biology Conference
REED OIP
T: (33) 1.41.90.47.86 / F: (33) 1.41.90.48.89
Web site: www.sdbio.fr
E-mail: jib@reed-oip.fr

11/15-17/2001
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MAPIC Exhibition/ International Real Estate Show
REED OIP
T: (33) 1.41.90.46.39 / F: (33) 1.41.90.45.30
Web site: www.mapic.com
E-mail: lara.hinton@reedmidem.com
U.S. Pavilion organized by show organizer and sponsored by
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FUNERAIRE / Funeral Services Trade Show
REED OIP
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Web site: www.salon-funeraire.com
E-mail: h.charmoille@cosp.fr
U.S. pavilion recruited by the show organizer
plus Business information Center
FCS/France contact: E-mail: alain.levy@mail.doc.gov

11/16-19/2001
Albertville

HOTELLERIE / Alpine Hotels and Gastronomy Exhibition
SAVOIEXPO
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Web site: under construction
E-mail: savoieexpo@wanadoo.fr

11/20-22/2001
Paris

INTERSELECTION / Fashion and Lifestyle
INTERSELECTION
T: (33) 1.47.56.32.32 / F: (33) 1.47.56.32.99
Web site: www.interselection.com
E-mail: interselection@la-federation.com

11/20-22/2001
Montpellier

SITEVI / International Exhibition of Equipment and Techniques for
the Wine, Fruit-growing and Wine-making sectors
EXPOSIUM
T: (33) 1.49.68.51.00 / F: (33) 1.49.68.52.99
Web site: www.sitevi.com
E-mail: sitevi@exposium.fr
Business Information Center
FCS/France contact: E-mail: Pascale.Mittet@mail.doc.gov

11/20-23/2001
Paris

MIDEST / International Subcontracting Exhibition
REED EXPOSITIONS FRANCE
T: (33) 1.47.56.50.00 / F: (33) 1.47.56.21.40
Web site: www.midest.com

E-mail: info@midest.com

11/20-23/2001

Paris

MILIPOL 2001 / International Police & Security Equipment
Exhibition

IMEXPO

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Web site: www.milipol.com

E-mail: imexpo@wanadoo.fr

U.S. Pavilion – Trade Fair Certified by U.S. Department of
Commerce

FCS/France contact: e-mail: cara.boulesteix@mail.doc.gov

11/21-22/2001

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TECHNOMAG / Retail Technology Solutions
EXPOSIUM

T: (33) 1.43.68.51.00 / F: (33) 1.47.37.74.38

Web site: www.technomag.com

E-mail: technomag@exposium.fr

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Paris

MAINTENANCE / Maintenance Trade Show
INFOPROMOTIONS

T: (33) 1.44.39.85.00 / F: (33) 45.44.30.40

Web site: www.groupe-solutions.com

E-mail: j.baron@infopromotions.fr

11/21-23/2001

Paris

QUALITECH / Quality in Manufacturing
INFOPROMOTIONS

T: (33) 1.44.39.85.00 / F: (33) 1.45.44.30.40

Web site: www.groupe-solutions.com

E-mail: e.siboun@infopromotions.fr

11/30-12/10/2001

Paris

NAUTIQUE INTERNATIONALE / Boating Show
REED OIP

T: (33) 1.41.90.47.10 / F: (33) 1.41.90.48.39

Web site: www.salonnautiqueparis.com

E-mail: nautique@reed-oip.fr

12/1-9/2001

Paris

SALON DU CHEVAL, DU PONEY, ET DE L'ANE / Horse, pony
& Donkey Exhibition

CEP

T: (33) 1.49.09.64.82 / F: (33) 1.49.09.60.03

Web site: www.comite-expo-paris.asso.fr

E-mail: info@comite-expo-paris.asso.fr

12/4-6/2001

Paris

LUDIK'EXPO / Trade Show for Leisure and Entertainment Parks
REED EXPOSITIONS FRANCE

T: (33) 1.47.56.21.08 / F: (33) 1.40.87.08.43

Web site: www.reedexpo.fr

E-mail: françoise_regnier@unmf.fr

12/4-7/2001

POLLUTEC / Exhibition of Equipment, Technology and
Services for the Environmental industry

Paris	<p>REED EXPOSITIONS FRANCE T: (33) 1.47.56.21.14 / F: (33) 1.47.56.21.10 Web site: www.pollutec.fr E-mail: info@pollutec.com U.S. Pavilion – Trade Fair Certified by U.S. Department of Commerce FCS/France contact: E-mail: everett.wakai@mail.doc.gov</p>
01/30-31/2002 Paris	<p>DECITRONIC / Micro electronics BCI, Groupe Adhesion T: (33)-1 41 86 41 42 / F: (33)-1 46 03 86 26 Web site: www.decitronic@adhes.com U.S. Pavilion with FCS France support services FCS/France contact: everett.wakai@mail.doc.gov</p>
01/10-14/2002 Paris	<p>MEUBLE DE PARIS / Furniture COSP T: (33) 1.40.76.45.00 / F: (33) 1.45.63.78.24 Web site: www.salondumeuble.com E-mail: info@salondumeuble.fr</p>
01/10-14/2002 Paris	<p>BUREAU D'AUJOURD'HUI ET CONCEPTION / Office Supplies and Stationery COSP T: (33) 1.40.76.45.00 / F: (33) 1.45.63.78.24 Web site: www.cosp.fr E-mail: info@cosp.fr</p>
01/11-15/2002 Paris	<p>MAISON ET OBJETS / International Home Decoration Show SAFI T: (33)-1 44 29 02 00, F: (33)-1 44 29 02 01 Web site: www.maison-objet.com E-mail: info@decoplanet.com U.S. Department of Commerce/TD contact: e-mail: ludine.capone@mail.doc.gov FCS/France contact: e-mail: caroline.de.villoutreys@mail.doc.gov.</p>
01/23-25/2002 Paris	<p>SEMAINE DE LA RELATION CLIENT / Direct Marketing CEP EXPOSIUM T: (33) 1.49.68.51.00 / F: (33) 1.47.37.75.09 Web site: www.exposium.fr E-mail: info@exposium.fr</p>
01/25-28/2002 Paris	<p>INTERNATIONAL LINGERIE SHOW/ Women's Lingerie SODES T: (33) 1.44.94.70.00 / F: (33) 1.44.94.70.05 Web site: www.pretparis.com E-mail: visdept@pretparis.com</p>
01/25-28/2002 Paris	<p>PRET-A-PORTER / Women's Ready-to-Wear Fashions SODES</p>

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